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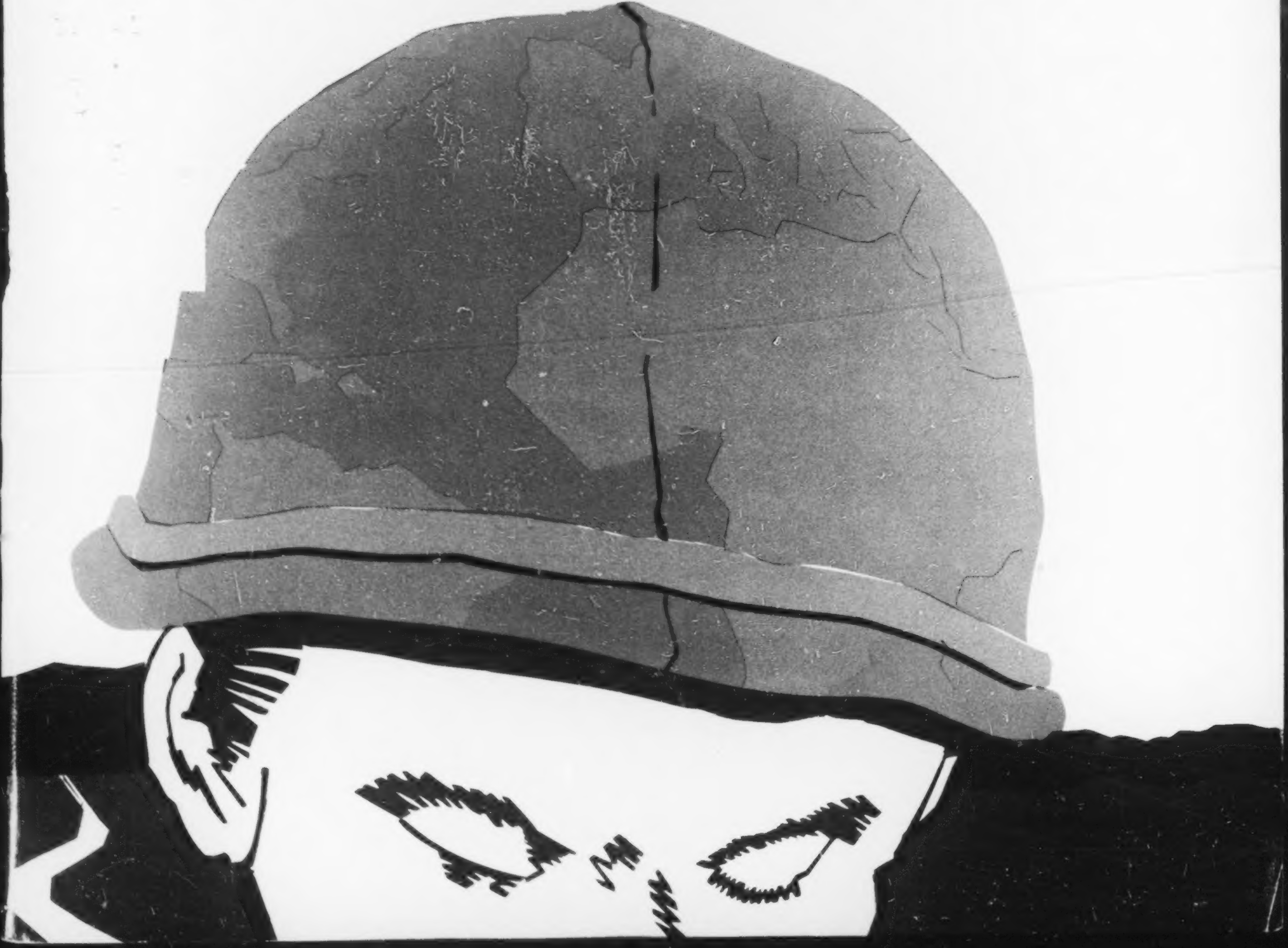
WINTER 1985

# The Long Road to Europe



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# Interservice

THE QUARTERLY JOURNAL FOR THE INTERNATIONAL AND MILITARY MARKETING PROFESSION

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# Hurdle Those Specs With ADCoP

### BY DAN LARSON

Selling food to the military has not always been a simple matter. Detailed specifications—"specs" as they are called—have long been a specter overshadowing the whole process, a major disincentive for most businesses, despite the fact that they have been standard operating procedure for years.

*Dan Larson is a Washington, D.C.-based writer who has many years' experience as an executive in several retail grocer associations.*

ILLUSTRATION BY CHRISTINE SMITH

Imagine yourself head of a small, family-owned business which makes fruit jams and jellies. Wouldn't it be great, you say, to be able to get a contract to sell strawberry jam to the military. What an opportunity to expand your business. So you look into what's required and find out there is a detailed, 30-page government specification just on how you must make your jam in order to sell it to the government.

End of dream.

Or maybe not. You may have, in one relatively new government program, a savior, guardian angel and tooth fairy all wrapped up in one package: the military's ADCoP Program. The acronym stands for

Acquisition and Distribution of Commercial Products, and it means dynamic new opportunities in the military's multimillion dollar subsistence programs.

## Why ADCoP?

ADCoP appeals to those companies whose products have commercial recognition but who do not currently sell them to the government. Such businesses have either consciously, as a matter of policy, or as a general response to the difficulties of responding to military specification, chosen not to sell to the government. The reasons vary from not wanting more government plant inspectors to concerns about the potential red tape.

**ADCoP has forced government buyers, traditionally insulated behind the protective wall of specifications, into the commercial marketplace.**

For manufacturers or producers with the facilities, manpower and inclination to adapt and retool to military specifications, elaborate specs have posed no serious problem. Their biggest hurdle has been just getting the bid to produce the product. For many smaller companies, however, this enormous potential market has been out of reach.

With ADCoP, all this has changed. Because it simplifies what had been such a difficult process, it appeals not only to small businesses but also to the institutional food sales and military food program managers of large companies.

Why are matters simplified? First, businesses no longer have to deal with detailed, complex, "gotcha"-type specifications; second, if a product has commercial market acceptability, the government will not send in more inspectors to interupt operations; and third, the Prompt Payment Act obligates the government to pay its bills in a timely manner.

## How ADCoP Started

The ADCop ball got rolling in 1972 when the blue-ribbon Commission on Government Procurement examined the government's buying practices, including food. (see Box, page ). The Commission proposed several ideas for more efficient and cost effective acquisition, but also posed a revolutionary question: if a commercial product exists, that is being sold on the market and fills government's needs, why go through all the rigmarole of specs?

Take, for example, a common bottle of steak sauce, destined for a military mess hall table. There may be no identifiable difference between the steak sauce produced to military specifications and the steak sauce available in the commissary or supermarket. Nevertheless, prior to the advent of ADCoP, the mess hall's steak sauce had to be produced according to elaborate government specs.

The Commission decided that this was not only unnecessary but also made no sense economically.

With this groundwork laid by the Commission, ADCoP got its formal start in 1978. Responsibility for the program as it pertained to subsistence was assigned to the Defense Personnel Support Center (DPSC), part of the Defense Logistics Agency, headquartered in Philadelphia, PA.

DPSC is the largest single institutional food buyer in the world, representing approximately two percent of the total food purchased in the U.S.

A significant part of the agency's effort is focused on the subsistence needs of the Armed Forces throughout the world. In fiscal year 1984, the subsistence portion alone of DPSC equaled over $2.2 billion in procurement obligations.

## What Bidders Need To Know

Suppose you are interested in becoming an ADCoP supplier. What do you need to know and how do you go about it?

The first step, if you want to receive DPSC solicitations, means you must get your name on the agency's Bidders Mailing List. To do this, simple contact DPSC headquarters in Philadelphia or the Defense Subsistence Region – Pacific in Alameda, CA. (see Box for full details).

Written solicitations are used to obtain offers on carlot quantities (except fresh fruits and vegetables) and generally on less-than-carlot quantities as well. From time to time some items may also be solicited orally.

In either case, both Invitations for Bids (IFBs) or Requests for Proposals (RFPs) are supplemented by a Master Solicitation. This contains the terms, conditions and provisions which remain constant. DPSC will be happy to assist to get the ball rolling.

In fact, one of the difficulties DPSC has had to overcome with ADCoP is a lack of promotional opportunities. Large companies who maintain regular communications with DPSC have been alerted to the program. Advising small businesses has proven to be a more difficult challenge. Nevertheless, in the first years of operation, DPSC has managed to attract 50 new small businesses to the bidding process. They want to keep the momentum going.

## Advantages of ADCoP

What's in it for DPSC, you ask? At the minimum there are a number of logistical advantages to the program to help stretch tax dollars. Certainly the first to come to mind is reducing the hard copy volume of item descriptions. Many suppliers can remember the day when DPSC used a 33-page specification to buy frankfurters. Today, with ADCoP, the Commercial Item Description (CID) is down to less than two pages.

Other economies have also been realized. Increased competition has reduced acquisition costs on many items and frankfurters are again a good example.

Prior to ADCoP, there were a maximum of four bidders offering to sell hot dogs. Now there may be as many as thirteen.

DPSC is now able to pay about 10¢ per pound less for franks which translates into an annual savings of about $600,000.

In addition, production lead time has been shortened on some items, thereby reducing inventory investment. Acquisition strategy has been changed on some items to take advantage of commercial practices which have assured product availability.

**ADCoP appeals to those companies whose products have commercial recognition but who do not currently sell them to the government.**

## ADCoP Item Selection

An item gets selected for the ADCoP Program only after careful review. The action centers around the ADCoP Item Selection Committee, composed of the assistant chiefs of each of the three DPSC headquarter subsistence divisions. The committee takes a look at an item based on the results of an acquisition strategy analysis and, essentially, seeks to determine if the item is a good fit for the program.

If they like what they see, the Committee forwards a favorable recommendation to the Armed Forces Product Evaluation Committee for their consideration. This committee is composed of representatives of the Army, Air Force, Navy and Marine Corps. An item must receive unanimous endorsement before becoming an ADCoP item. However, once it makes the grade, all future acquisitions are made on an ADCoP basis.

**Over the course of the entire program, since 1978, more than two-thirds of ADCoP award dollars have gone to small business firms.**

Since the program began in 1978, the DPSC's subsistence managers have converted approximately 200 National Stock Numbered (NSN) items from government specifications to ADCoP. In fiscal year 1983, over $75 million was awarded in ADCoP subsistence acquisitions. This was more than double the previous year.

Through the first half of fiscal year 1984 – the period for which the most recent figures are available – ADCoP awards totaled $30.1 million.

## Political Challenges

If the latest ADCoP figures suggest a slight acquisition decline, the observation must be looked at in a political context. ADCoP was severely hampered by language in a 1983 Department of Defense Appropriations Act which in effect said that small businesses could not be excluded from bidding, even though they did not qualify as commercial producers.

At the time, Navy Vice Admiral Eugene K. Grinstead, since retired as director of the Defense Logistics Agency, perhaps summarized the problem best. He said, "For some time, we have been working on converting military specifications to commercial item descriptions, or CIDs, where feasible.

"The program seemed to have good potential but we have hit a snag which is causing some delays. The program appears to be having some impact on small businesses doing business with DOD. As you probably know, the commercial item description program was aimed towards products with a demonstrated commercial acceptance and this hurt some of the smaller producers who were making items to government specs – they suddenly found some real stiff competition they couldn't handle, so we are taking another hard look at this entire area."

## Solving The Problem

And look hard they did. It was clearly not a simple problem. If DPSC based its acceptance of bids on commercially successful products, what about manufacturers who were capable of making products which they had never made but on which they wished to bid? What about established producers who had been making fine products for years, sold them at competitive prices, but only to the government?

These manufacturers and producers had no proven commercial market acceptance for their products because they had never sought it. However, this did not mean that they did not have the capability. Something clearly had to be done to ensure that ADCoP was a fair program and open to all.

To the rescue came the DOD's Defense Material Specifications and Standards Office. They set forth a "flexible" approach towards preparation of commercial item descriptions (CIDs).

The intent was – and is – to tailor acquisition strategy to the specific item being bought. Such a strategy allows all potential suppliers to compete on a similar basis.

The new approach is basic and straightforward. Simplified CIDs may now be prepared when there is no expected impact on small business, when defining regulated products like milk or when the purchase is primarily expanding on established, nongovernment standards.

When greater detail is needed, an expanded CID may be developed. A new ADCoP clause now allows bidders two different options. For those manufacturers who have products with commercial market acceptance, they may bid on that basis. Equally, those manufacturers who do not yet produce a given item, but have the capability to do so, may also bid. With all things being equal, the low bidder still gets the contract.

CIDs are sufficiently detailed so that manufacturers who do not make the specific commercial item on which they wish to bid at least know what is expected of the item. It also allows the government, in the absence of the commercial item, to be able to make some objective testing.

## How ADCoP Got Started

The specter of specs has hung over the food acquisition process of the military for years, but all this began to change in 1972. In that year, the Commission on Government Procurement, comprised of members from industry, Congress and the executive branch of government, submitted a report to Congress. One section of the report, "Acquisition of Commercial Products," offered a revolutionary idea.

The Commission said that there was a "need for a shift in the fundamental philosophy relative to commercial product procurement." It was felt that in federal procurement, too much reliance had been placed on the use of detailed specifications. The report further suggested that using specifications when equally acceptable products were being sold to civilians was resulting in higher costs to the government.

It was concluded that strict interpretation of specs either forced some producers out of government work or discouraged them altogether from participating. Reduced competition was the obvious consequence, with food for subsistence requirements costing more than it should.

The Commission recommended that specifications not be used when the government is but one of many buyers for a particular product. It went so far as to say that "food specifications are the most unusual and confusing of all Federal Specifications in the procurement system."

Institutionalizing the Commission's initiatives became the responsibility of the Office of Federal Procurement Policy (OFPP). Shortly afterwards, in 1976, came the first policy statement to buy commercial. DOD Directive 5000.37, issued in 1978, eventually hit the button that launched ADCoP.

# ADCoP Purchases by Products
# Fiscal Years '81-'83

| (Non-Perishables) | FY 81 | FY 82 | FY 83 | Totals |
|---|---|---|---|---|
| Apple Butter | $ 13,852 | $ 160,841 | $ 41,731 | $ 216,424 |
| Beans (Refried) | 48,731 | 90,599 | 86,204 | 225,534 |
| Baking Soda | 139,642 | 355,216 | 153,658 | 648,516 |
| Bean Sprouts | 994,063 | 408,241 | 245,169 | 1,647,473 |
| Cereals | 441,288 | 343,411 | 425,407 | 1,210,106 |
| Cereals (RTE) | | 452,050 | 2,017,492 | 2,469,542 |
| Cherries (Marachino) | 288,153 | 563,284 | 697,509 | 1,548,946 |
| Coffee (HCG) | 54,205 | 59,391 | 65,488 | 179,084 |
| Cranberry Sauce | 688,970 | 335,136 | 678,639 | 1,702,745 |
| Cream Substitute | 431,970 | 281,111 | 832,389 | 1,545,470 |
| Garlic (DHY) | | 61,952 | 9,156 | 71,108 |
| Hominy Grits | 348,004 | 587,028 | 323,553 | 1,258,585 |
| Honey | 131,363 | 120,409 | 220,562 | 472,334 |
| Hot Sauce | 218,789 | 369,328 | 263,907 | 852,024 |
| Milk (Evaporated) | 680,239 | 738,984 | 608,891 | 2,028,114 |
| MSG | 124,460 | 198,238 | 106,255 | 428,953 |
| Mustard | 208,677 | 34,476 | 523,932 | 767,085 |
| Onions | 140,006 | | 547,277 | 687,283 |
| Paprika | 505,549 | 119,357 | 52,926 | 677,832 |
| Peanut Butter | 239,124 | 881,087 | 350,758 | 1,470,969 |
| Pepper | 149,117 | 58,301 | 1,402,147 | 1,609,565 |
| Potatoes | 376,493 | 5,275,522 | 2,147,230 | 7,799,245 |
| Ravioli (HCG) | 175,168 | 418,185 | 254,397 | 847,750 |
| Salad Dressings | 501,708 | 697,238 | 427,563 | 1,626,509 |
| Salt | 646,871 | 644,463 | 621,130 | 1,912,464 |
| Soy Sauce | 437,149 | 286,254 | 228,092 | 951,495 |
| Starch | 35,660 | 188,414 | 176,036 | 400,110 |
| Steak Sauce | 320,940 | 259,511 | 259,777 | 840,228 |
| Sugar | 13,759,683 | 13,396,642 | 12,267,342 | 39,423,669 |
| Tea | 257,632 | 820,028 | | 1,077,660 |
| Vinegar | 490,893 | 652,112 | 369,654 | 1,512,659 |
| Worcestershire Sauce | 273,887 | 186,562 | 209,039 | 669,486 |
| **Subtotals** | **23,122,286** | **29,043,371** | **26,613,310** | **78,778,967** |

| (Perishables) | FY 81 | FY 82 | FY 83 | Totals |
|---|---|---|---|---|
| Bacon | 1,002,472 | 1,652,211 | 2,398,224 | 5,052,907 |
| Bologna | | 187,298 | 755,617 | 942,915 |
| Bread, Rolls, etc. | | 2,000,000 | 32,676,271 | 34,676,271 |
| Butter | | | 2,131,233 | 2,131,233 |
| Cheese | | | 902,765 | 902,765 |
| Frankfurters (5-10 lb.) | | | 767,170 | 767,170 |
| Frankfurters (1-2 lb.) | | 288,186 | 2,998,123 | 3,285,309 |
| Indiv. Servings | 269,525 | 530,042 | 283,807 | 1,083,374 |
| Potatoes (Frozen) | | | 6,684,712 | 6,684,712 |
| **Subtotals** | **1,271,997** | **4,657,737** | **49,597,922** | **55,528,656** |
| **Grand Total** | **$24,394,283** | **$33,701,108** | **$76,211,232** | **$134,307,623** |

## Striving For Flexibility

Al Cardone, Assistant Chief of DPSC's Contracting and Production Division, has as much as anyone to say about the streamlined virtues and flexibility of ADCoP. He says, "Every buyer wants to make sure he is getting what he is paying for. In the supermarket industry, if a product does not move off the shelf, they have a big sale or they give it to charity or maybe they can return it in some way.

"The government does not have all those options so we have specifications for products and inspectors to make sure we are getting what we pay for. This all changed under the ADCoP program. It was replaced with 'commercial market acceptability.'

"A product sold commercially is, to a large degree, a certification that the product is acceptable. Just having space on a supermarket shelf – which is not easy to come by – shows that. So we use commercial market acceptability in place of specifications."

The DPSC is optimistic about the use of CIDs as a shorthand substitute for lengthy specs. Says Cardone, "With the congressional language, we were given the clear directive that small businesses cannot be excluded. It was at this point that we developed the two-part solicitation, composed of commercial market acceptability or commercial item descriptions. A CID has to be detailed enough to describe what we want and, through objective testing, to make sure we get what we want.

"However, we are trying to walk a fine line and avoid putting so much protection back into documents that we wind up coming full circle with specifications.

"We want any business that wants to bid to have a reasonable and fair chance," concludes Cardone.

The irony is that small businesses have been participating – more than 50 have won an assorted variety of contract awards – and their share of the ADCoP pie has been growing noticeably larger. Over the course of the entire program, since 1978, more than two-thirds of ADCoP award dollars have gone to small business firms.

## How To Get Your Solicitations

**To receive DPSC's solicitations for food acquisitions, and to get your company's name on the agency's Bidders Mailing List, simply contact DPSC headquarters or the Defense Subsistence Region – Pacific, listed below:**

Headquarters
Defense Personnel Support Center
Contracting and Production Division
Directorate of Subsistence
2800 South 20th Street
Philadelphia, PA 19101
(215) 952-4200

**Defense Subsistence Region – Pacific**
2155 Mariner Square Loop
Alameda, CA 94501
(415) 869-4131

## The Grace Commission Studies ADCoP

There are roughly 1,800 NSNs in the DPSC's item catalog. The question might be, why not make them all part of the ADCoP program?

The President's Private Sector Survey on Cost Control, otherwise known as the Grace Commission, took a look at the ADCoP program and asked the same question.

The simple answer is that not all products acquired for our military are commercially available. Some products are ruled out solely on the basis of their packaging. Is it possible to find a home cook who needs 10 gallons of fresh egg yolk? Bakery mixes are another example. The military uses them canned, but they are generally not considered commercial items by the military.

**DPSC has managed to attract 50 new small businesses to the bidding process.**

Okay, the Grace Commission conceded, but how many items *would* be good candidates for conversion? DPSC suggested perhaps 600 items, or three times the number that are now ADCoP items.

In fact, that is what the DPSC is doing now: looking at every item in a deliberate, businesslike way to measure whether adding it to the list will meet the needs of the service, and also whether it will improve the acquisition process. If it passes this inspection, the item will traverse the review process and in all likelihood be added.

## Buyers Face The Market

ADCoP has brought some unexpected changes to the agency that is responsible for its management. It has forced government buyers, traditionally insulated behind the protective wall of specifications, into the commercial marketplace. They now have to know who is in the marketplace, where they are operating, how are they selling, who are they selling to and how products stack up price-wise.

This one change alone has made its mark on everything that touches ADCoP. It brings the dynamics of the commercial marketplace right onto the government buyers' desks. It makes them better buyers, it leads them to better products for the government, and it saves time and money. It's hard to argue with that.

## Suppliers Are Positive

Companies large and small who have participated in ADCoP see it as a viable and productive business opportunity, and pursue it as such.

Raymond T. Pelelas, Manager for Military and Export Sales at Kitchens of Sara Lee, says, "I endorse the concept of ADCoP. Implementation of this policy by the Department of Defense necessitates adjustments according to the items to be acquired or distributed. These adjustments, if properly made, should reduce defense spending and, at the same time, provide an adequate vendor base for our national defense."

Observations of a small supplier come from Jim Bergman, Vice President of the Bergman Meat Packing Co., a family business in Pittsfield, IL, who says, "ADCoP helps us considerably. It allows us to compete with our frankfurters and bologna in the market, and allows us greater production and sales. It is a good program." And that is the bottom line.

The fact is that ADCoP has gone through a lull. It was treading water and, while it was not sinking, its forward momentum was diminished.

The next couple of years will be important to regain that momentum. As a government program, it is exceptionally well conceived and administered. The DPSC knows it must continue to meet the many challenges of its mission and will do everything possible to make ADCoP a continuing success story. ■

For more information about business opportunities under ADCoP, write to the DPSC at:

Headquarters
Defense Personnel Support Center
Contracting and Production Division
Directorate of Subsistence
2800 South 20th Street
Philadelphia, PA 19101
*or telephone:* (215) 952-4203

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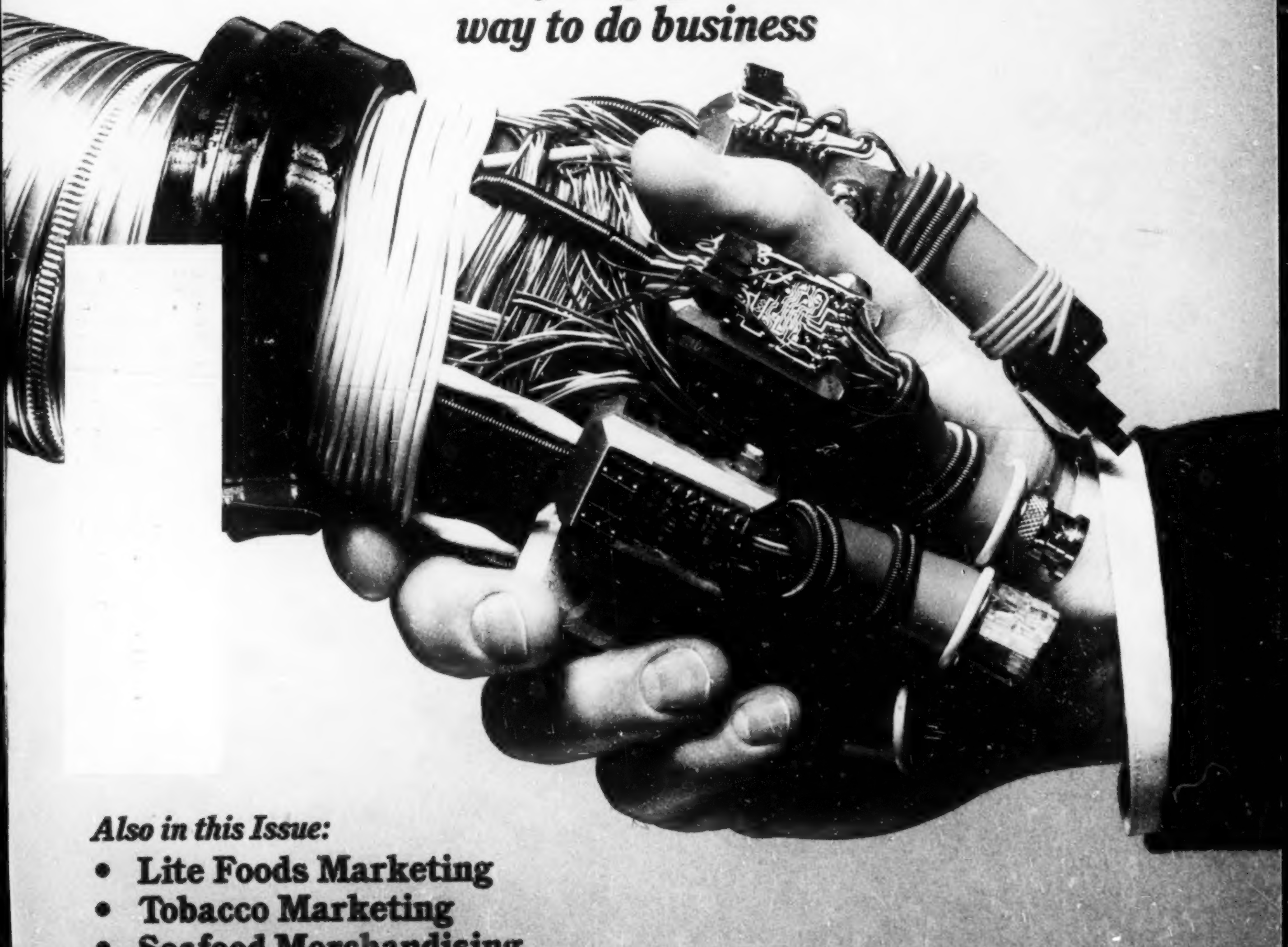

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# Marketers Turn on the Lite

**With the U.S. military setting the pace for lower sugar, sodium, caffeine, fat and cholesterol levels in the foods they eat, Americans generally are turning in vast numbers to new "lite" foods. Manufacturers are increasingly devoting research and marketing dollars to new product lines that satisfy the explosive demand for these "lite" foods. Product offerings today range from new frozen entrees to "lite" spices. And the list continues to grow . . .**

BY KATHY BOYLE

The current trend to eat "lite" and drink "lite" began about ten years ago. Miller Brewing plunged full steam ahead into what was previously the full-bodied beer market. Low-calorie beers, until just a decade ago, were the domain of women and softies.

With the national rollout of Miller "Lite" came the blitz of national advertising featuring retired athletes and others who changed the beer market forever. And it didn't take food manufacturers long to follow.

Products familiar to dieters for years suddenly appeared with new labels and new advertising. Today there are "better for you" foods in virtually every product category in the supermarket.

The trend toward "lite" foods can best be explained as a trade-off. "If I give up a little here, I'll be able to splurge over there," is the current thinking.

Nowhere is this more evident than recent media campaigns. A perfect example is the popular TV ad with Cathy Lee Crosby enviously eyeing a tempting piece of cake. She explains why she uses a low-calorie sweetener in order to enjoy some cake now and again. People don't want to starve themselves and give up all the foods they enjoy. Instead they may select chicken rather than beef, use a lite salad dressing, or ask for a diet soda rather than a full-calorie variety. In return they can "munch out" once in a while on calorie-crammed, cream-filled eclairs.

*Kathy Boyle is a Washington, D.C.-based freelance writer specializing in club, foodservice and retail grocery subjects. She is also a frequent contributor to* Interservice *magazine.*

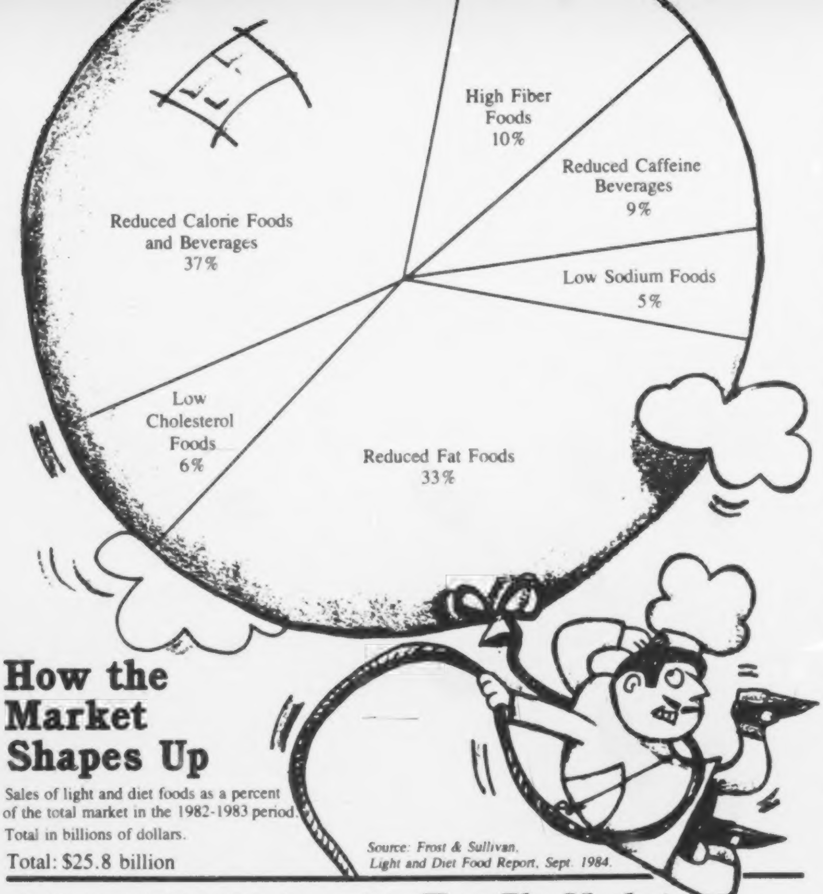
The new thinking is transforming supermarket stock assortments as increasing numbers of new "lite" products make their way onto grocery shelves. In the latest *Progressive Grocer* Annual Report on Supermarkets, 40 percent of the retailers surveyed listed low-calorie, dietetic and low sodium-oriented products as their most successful items last year. The list includes NutraSweet products, low-calorie and caffeine-free carbonated beverages, sugar and or salt substitutes, and salt-free items. In addition, *New Product News* reported that more than 15 percent of new product growth occurred in the low-calorie, dietetic and low-sodium categories in 1983.

## Military Backs Good Health

For the military, the health and fitness craze has always been a passion. But never more so than today. The military leadership is solidly behind programs to "get out the fat."

Today's health consciousness includes "back to basics" training, even for the higher ups and those with desk jobs who traditionally aren't hassled with exercise

ILLUSTRATION BY ROBYN EWING



## How the Market Shapes Up

Sales of light and diet foods as a percent of the total market in the 1982-1983 period. Total in billions of dollars.

Total: $25.8 billion

*Source: Frost & Sullivan, Light and Diet Food Report, Sept. 1984.*

and diet control. Each of the four service branches has its own regulation on weight.

"In the Army, if an individual is identified as having a weight problem, they are counseled by a physician and a program of diet and fitness is diagnosed," explains Major Robert N. Mirelson, an Army spokesman. "If improvement is not forthcoming, as has been the case with some individuals, there have been instances of personnel actually being kicked out of the military," he says.

In their hopes of reaching beyond the mess hall, the Army has extended its fitness program to reach the soldier's family. "We have three diet and exercise manuals—one for the individual, one for the unit, and, more recently, a manual for the family," Mirelson points out. The information program is significant because it encourages the entire military household to eat a more balanced diet, altering the military consumer's shopping patterns at the commissary.

Although the new American passion is to be in the best of health and in peak physical condition, marketers recognize that the trend is no passing fad for the military. Current pressure on the *entire* military community to reexamine food consumption patterns can only mean that lite food marketing opportunities will continue to blossom.

## How The Market Shapes Up

Lighter and healthier foods easily make up the fastest-growing segment of the food retail industry, accounting for a vigorous 9 percent of total sales. At the core of the "lite" foods category are products considered low in either calories, caffeine, cholesterol, fat or sodium.

**The frozen entree category has seen a surge of international entries, especially Oriental varieties.**

The impressive gains in the lite category are dependent on a successful merchandising strategy, which marketers generally agree should find lite foods mingled in with their regular non-lite counterparts.

"We always suggest selling our low-sodium soups next to the regular soups," says James H. Moran, a senior manager at Campbell Soup. Another suggested alternative is to create a special or separate section for either diet or lite foods. Consumers may not consider themselves on a diet and may therefore forget to check a separate diet section.

When confronted with a side-by-side choice, however, consumers may weigh the merits of a "trade-off," opting instead for a lite food selection. The obvious drawback to this merchandising approach, from the marketer's point of view, is that it openly invites price comparison.

The rush to keep pace in the lite market has forced some food marketers to reformulate their regular product lines. The intense competition has also led to the creation of entirely new products. When the decision was made to introduce a new line of low-sodium soups, "We reduced sodium in 40 of our regular soups," Campbell's Moran explains. "And we spent over $6 million revamping our Swanson TV dinners, which had never changed since the 1950's. We reduced sodium, fat, and calories, substituting rice for french fries in some cases, or reducing some of the gravy in other dinners," he says of the Swanson line which is not specifically marketed as lite.

## Taste, Price Decide Choice

According to consumer test panels, taste is an important influence in lite food purchasing decisions. "Taste is a very sharp concern," notes Mona Doyle, president of Consumer Network. "Although the consumer is willing to spend for flavor, there is a wide misunderstanding among consumers as to why products advertising 'less' cost more," she says.

Consumer Network uses consumer panelists in its research and, according to Doyle, found "panelists think items packed without sugar should cost less than items packed with sugar. They're constantly irritated by the fact that light fruits and diet sodas cost more than their sugar-based equivalents."

The backlash of this consumer attitude has taken its toll on low calorie and low fat snack introductions from Wise Foods, part of the Borden Snack Group. Borden's snack operations since early 1983 have been marketing the Wise Lite-Line group of snacks, including Lite-Line Potato Chips, Lite-Line Cheese Puffs and Lite-Line Cheese Flavored Tortilla Chips. The products have one-third less fat and fewer calories than their regularly formulated counterparts.

Although the products had the built-in benefit of Borden's success in selling lite cheese, yogurt and cottage cheese, the company's marketing director, Ed Rutland, admits that "the products have only turned in an above-average performance, not nearly as well as we'd hoped," he says. According to Rutland the product is more expensive to manufacture and, as a result, a decision was made to go with a premium price.

Rutland speculates that "dieters tend to remove snack foods from their grocery lists altogether, ignoring the category when they are shopping. If they do notice the lite alternative, the premium price may discourage them."

Other manufacturers are taking Borden's cue by conducting extensive testing before rushing into a product category. "You might get excited by what research indicates people 'say they want,'" Rutland observes, "but for lite foods, success may depend on the specific category. Although lite beers and lite soft drinks did well, lite wines didn't," he explains.

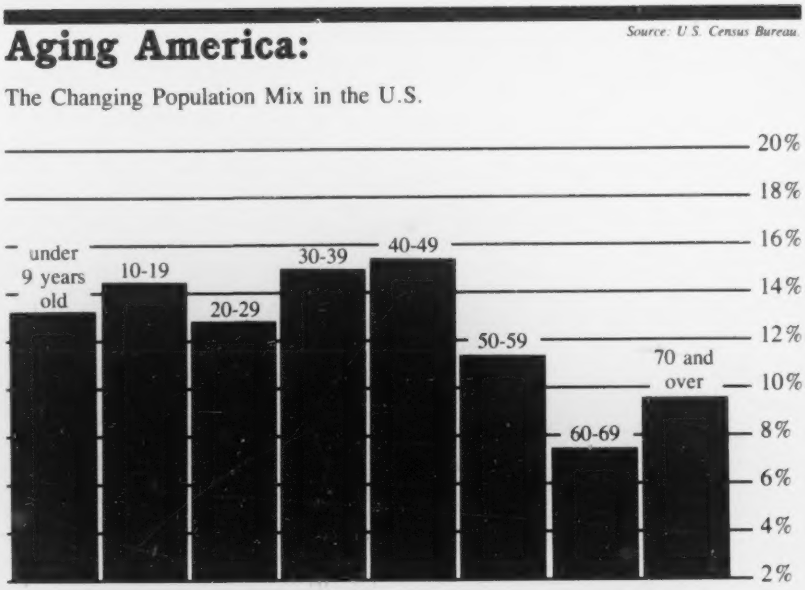
## High Ticket Entrees Show Growth

High ticket frozen entrees have gained strength over the past several years with an emphasis on the "light and good for you" promotion approach. Stouffer carried the torch and ignited the explosion of calorie-control premium frozen entree sales. Their Lean Cuisine, nationally distributed since 1982, revitalized the category originally created by the Weight Watchers line. In 1983 the category pushed annual sales over the $400 million mark.

It is at these crossroads where the opposing trends, nutritious and healthy foods against gourmet foods, begin to mingle. In the lighter premium frozen entrees, quality is the big story. "Lean Cuisine, although calorie controlled, is designed to offer the taste, quality and general appeal of other Stouffer products," says Stouffer's Margarite Dannemiller in explaining the products' success.

## Aging America:

The Changing Population Mix in the U.S.



2000
U.S. Population: 267,990,000

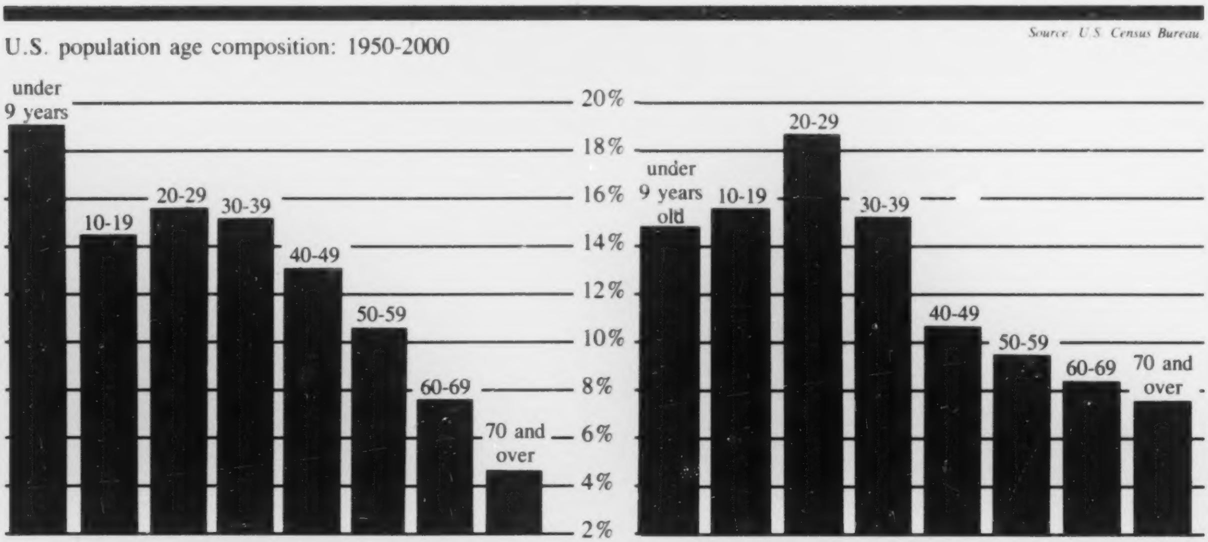
"We've learned that Lean Cuisine is being used for a number of medical diets besides weight loss," Stouffer's Dannemiller explains, "including some sodium restricted diets and diabetics." She cautions, however, that it would be difficult to specifically label entrees as being recommended for restricted diets because they are a combination of meat, rice and sauce, and might not meet stringent labeling requirements.

What Stouffer did on a broad scale many others are imitating. Most recently, the frozen entree category has seen a surge of international entries, especially oriental varieties, coming from companies ranging from Swift's International Entrees to Chun King's oriental chickens. From efforts to extend its offering of oriental entrees, of course, comes Green Giant's oriental stir-fry vegetable line.

## Appeal to the Aging

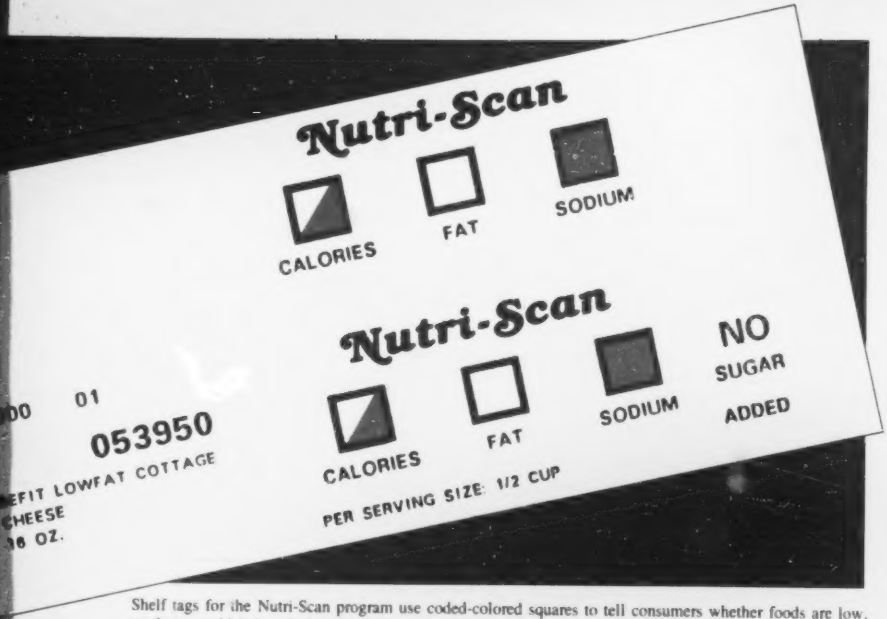
There are other factors at work in the current demand for lite foods quite apart from the fitness craze. The American population is aging at a rate so dramatic that health-conscious senior citizens nearly outnumber teenagers. And the transformation has taken place in little more than a

U.S. population age composition: 1950-2000



1983
U.S. Population: 236,413,000

1950
U.S. Population: 150,677,000



Shelf tags for the Nutri-Scan program use coded-colored squares to tell consumers whether foods are low, moderate or high in calories, fat and sodium. They also note if sugar is added.

generation (see accompanying tables).

No longer is youth the major buying influence in the country. The percentage of Americans between the ages of 25 and 44 has surged. The trend is clearly toward a steadily "older" America. As the children of the baby boom generation continue to alter demographic patterns, so will the number of Americans on restricted diets increase.

One company reaping benefits from restricted diets, in more ways than one, is Herb-Ox. The company has thus far introduced three low-sodium broths—beef, chicken and vegetable. According to Herb-Ox chemist Alan Albert, "We used potassium chloride as a substitute for sodium chloride in the new products." The high potassium content appealed to dieticians at nursing homes and hospitals who quickly picked up on the new broths, at once increasing orders for the broths and delivering an additional source of potassium for older patients, often in need of increased potassium since some medicines reduce their natural levels.

## Retailers Highlight the Lite

Several retailers have experimented with programs to give special identification and identity to lite foods. First National Supermarkets (Maple Heights, OH), for example, has developed a Nutri-Scan program that integrates special diet products with its regular selections in 57 stores.

The Nutri-Scan system employs shelf tags to capture the busy shopper's attention. What's more, the tags were specially designed to catch attention in 30 seconds or less.

The tags are imprinted with three separate "content" boxes: calories, fat and sodium, and sugar added. If a box is fully colored in, for example, the product is high in that particular content category. If the box is empty the reverse is true.

In the Washington, D.C. metropolitan area the Giant Food chain began testing another program in March 1981 dubbed Special Diet Alert. The Giant program was carried out in cooperation with the Food and Drug Administration. The thrust of Giant's efforts aimed at identifying products low in either cholesterol, fat, sodium or calories with easy-to-use shelf labeling. Today, Giant's shelf labels alert customers if the product is low in cholesterol, sodium or calories in a designated area on the unit price label.

About a year ago the U.S. Army Troop Support Agency (USATSA) initiated a "Fit to Win" shelf labeling program in its commissary stores. The program does not include every product low in sodium or calories but it does attempt to identify some products, especially some of the newer low sodium and low calorie products, to bring them to the attention of shoppers.

**In-store demonstrations have given new lite products a boost to win consumer acceptance.**

A shelf label with the Fit to Win logo is attached to the shelf in front of the product, highlighting whether the product is low in sodium or low in calories. In addition to the Fit to Win program the Army has talked to the Food and Drug Administration about various other labeling programs, such as the one initiated at Giant Food, but currently there is nothing definite in USATSA's planning.

Other retailer labeling programs employ techniques ranging from an offering of their own house brand lite selections to distribution of pamphlets suggesting recipes and menus for special diets.

## Categories Gain New Life

It was once thought that fruits packed in heavier syrups were of higher quality and, consequently, were more desirable. Today, however, canned fruits of virtually every variety are undergoing change to reflect a new consumer demand. Health-conscious consumers want to see a wider selection from which to choose, particularly in the amount of sugar added, and this pressure has led to the availability of ever-increasing numbers of new canned fruit items.

There are now several category segments, ranging from fruits packed in lighter syrup to fruits packed in water to fruits packed with artificial sweetners. Regardless of their in-pack medium, lite fruits have clearly caught on with consumers to become a booming category.

Del Monte, Dole and Libby Lite (now owned by Tri-Valley Growers of California) all have strong contenders in the lite fruit field. For a category that was ailing because dieters and health-conscious consumers increasingly turned to fresh produce, lite has returned some excitement to canned goods aisles. The apparent success with consumers, according to research done several years ago by Libby, is that the word Lite in the name is the key.

Diet fruit products had been on the market for years, but consumers were not as tempted by diet products as those labeled Lite.

It shouldn't surprise anyone that reduced calorie salad dressings fit into today's health-conscious lifestyle. Each passing week makes it more difficult to keep up with the flood of new products in this category. To achieve fewer calories, most of these new products contain either artificial sweeteners or reduced oil content.

Another category in the midst of change is canned tuna. Ralston Purina, manufacturers of Chicken of the Sea brand tuna,

# Unraveling the Labeling Mystery

To assure that foods honor their low or reduced calorie claims, the Food and Drug Administration requires manufacturers to meet specific limits on calorie content. This helps consumers shopping with weight control in mind to choose products that represent genuine calorie reductions. FDA's rules, which took effect on July 1 five years ago, apply to any food its maker claims to be useful in maintaining or reducing body weight or caloric intake.

Under FDA's regulations a food can be labeled "low calorie" only if a single serving supplies no more than 40 calories, and also contains no more than 0.4 calories per gram (28.4 grams = 1 ounce).

In order to be labeled "reduced calorie" a food must be at least one-third lower in caloric content than a similar food in which calories are not reduced; additionally, it must not be nutritionally inferior to the unmodified food. Products labeled as either low or reduced calorie must also bear nutrition labeling information.

Labeling on foods naturally low in calories, such as mushrooms, are not permitted to use the term "low calorie" immediately before the name of the product. For example, mushrooms could not be labeled "low calorie mushrooms" because it would suggest they're lower in calories than other mushrooms. They could, however, be labeled "mushrooms, a low calorie food."

Other foods normally eaten in small amounts, salad dressing for example, where they contain relatively few calories, cannot be labeled "low calorie" unless they yield less than 0.4 calories per gram. To be labeled "reduced calorie" this type of food must have at least one-third fewer calories than regular salad dressing.

If a food label suggests that calories have been cut it must back up that claim with numbers. Also, a reduced calorie food that does not smell and taste in most respects like the food for which it is offered as a substitute, for instance, canned pears in unsweetened water as opposed to canned pears in heavy syrup, must also be labeled with information about any differences that exist.

A food labeled "sugar free" or "sugarless" which is not low or reduced in calories must say so on the label. For instance, a sugar-free candy may contain sorbitol, a sweetener with the same caloric content as sugar.

A food aimed specifically at diabetics must bear the statement: "Diabetics: This product may be useful in your diet on the advice of a physician. This food is not a reduced calorie food." If the food does offer calorie savings, however, the last sentence may be eliminated. A food cannot be labeled "dietetic" or "diet" solely on the basis that it might be useful for diabetics. The reasoning is that this could be misleading to people seeking low or reduced calorie foods.

If the words "light" or "lite" appear on the label chances are that the product is low or reduced in calories. However, "light" can refer to other properties of food besides calories—"light cream" containing less milk fat, for example.

Consumers can usually determine whether a light food offers calorie savings by reading the label carefully.

Lite Ale
lean meat

today offers three special tuna varieties: 50 percent less salt, tuna packed in water, and new lite tuna with half the calories of the regular tuna.

The lite tuna introduced 18 months ago by Ralston Purina is beyond the test stage and is now positioned for continuing steady sales. The company saw the consumer trend and responded with a choice for consumers all its own.

To help consumers adjust to the different taste of the new tuna the company provided consumers with menu, recipe and serving suggestions. Some recipes suggest substituting herbs and spices—such as rosemary, pepper, curry, bay leaf, mustard powder or garlic—for the familiar taste of salt.

In-store demonstrations have given many new lite products the boost that's needed to win consumer acceptance. When Campbell Soup introduced its low-salt soup line, consumers who could stick with the soup for a few samplings were found to eventually prefer the low-salt choice.

In the deli department, traditionally a dangerous area for anyone on a salt restricted diet, several new low-sodium offerings have made their entrance. Hormel's Light and Lean luncheon meats are one of the latest and most popular low-sodium alternatives.

**The military's initiatives will provide information to pack alongside product in the shopping cart.**

## Diet Soft Drinks Sizzle

In its first year on the market, Diet Coke became the fourth best-selling brand in the entire soft drink category, making it the most successful new product introduction in history. Today Diet Coke has moved up yet another notch to capture third place among all soft drinks.

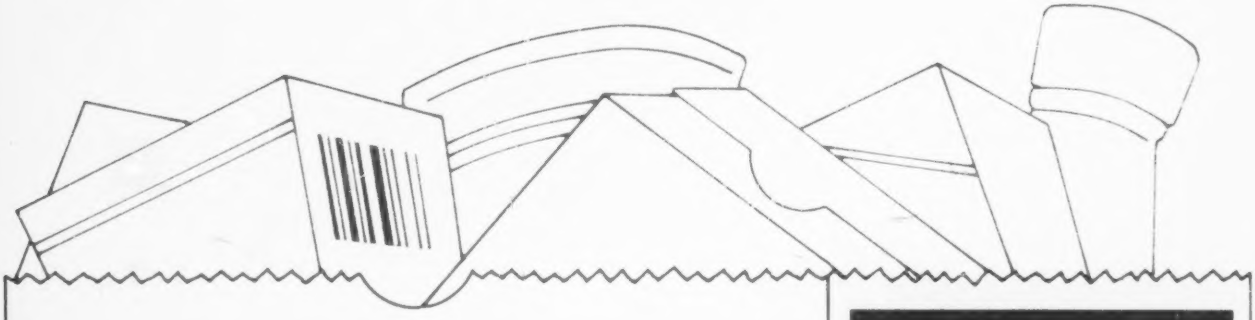
The diet category is where the sizzling new growth will be among soft drink beverages. In fact, many market observers expect the diet soft drink market to grow annually at about a 10 percent rate compared to a 2-3 percent growth rate for the entire category. Diet drinks currently make up about 20 percent of the overall soft drink industry.

## Growth...With Caution

Today's penchant for fitness is not likely to fade away overnight. But neither is the average consumer's willingness to sacrifice taste or quality. In certain product categories lite foods will thrive. In others there will be trade-offs. Consumers may be willing, as Cathy Lee Crosby suggests, to sacrifice in one category to eat a luscious dessert in return.

Finally, as the median age of the population continues to ratchet upwards (and the number of retired military increases) exerting its profound influence on retailers, aging Americans will increasingly demand more information about all food products.

The military's initiatives for commissary shelf labeling programs, now in place or in the advanced planning stage, may provide the special information military consumers will want to pack alongside product in the shopping cart. ■



# 4th Annual Commissary Sales Report

### BY ALAN GOLDSTEIN

This issue marks the fourth successive year *Interservice* magazine has published year-end sales reported by military commissary stores. With each passing year this "commissary sales report" has fixed itself in the minds of military marketers and their commissary management counterparts as an indispensable, "must have" *Interservice* feature.

Before work began on this year's report for fiscal year 1984 (October 1, 1983 to September 30, 1984), it was determined that a listing of commissary stores and their respective sales figures alone would not deliver a sufficiently detailed picture of commissary store sales and performance. The sales figures do not show, for example, that although an Army-operated commissary in Europe posted a total FY84 sales of $14 million, it had all it could do to keep up with its customers, reporting average monthly sales of $639 per square foot of selling space. This year's report therefore includes figures for the sales area and average monthly dollar sales generated by each individual commissary's selling space. For purposes of comparison and cross-reference, *Interservice* also ranks individual stores within each service branch by this average monthly productivity measure.

Numerous other additions and refinements have been made to add depth and meaning to this special report. The store-by-store sales tables, for example, now feature completely extended ACV (all commodity volume) data by store, by regional or complex area, and by CONUS

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*Alan Goldstein is the ALA's director of information and research. He is also editor of* Interservice *magazine.*

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and overseas. The ACVs for CONUS stores are based on CONUS sales only. All commissary stores located outside the 48 continental United States are reported overseas with their respective "overseas" ACVs. For quick reference, *Interservice* also ranks individual stores within each service branch by ACV.

Coupon redemption data add yet another new dimension to this year's *Interservice* report. Separate tables show the total number and dollar value of all commissary coupon redemptions, and the respective figures are broken down to indicate distribution patterns by CONUS, overseas and worldwide. The coupon data are of particular value today because commissary managers are placing a much greater emphasis on their more widespread distribution and redemption in remote CONUS and overseas areas.

It will already be obvious to many that the sales figures published on the pages that follow have an intrinsic value far beyond their dollar totals (see "ALA Viewpoint" in this issue). To those who use these figures to calculate their share of the sales pie, attempting to measure the effectiveness of their sales, marketing and distribution efforts against those of a competitor, the dollar amounts largely speak for themsleves. Here their chief purposes are to assist management in their efforts to more accurately target future objectives and, of course, to capture greater profits from an increased share of commissary store sales.

To commissary store management, however, the figures tell a different story. They speak not of "profits" or "shares" but of service to the millions of military men and women, their dependents, retirees and other eligible patrons who look to "their commissary" as the only means of stretching their already scarce disposable food dollar.

The commissary store manager is not without a performance incentive in the absence of traditional profit measures. Once again consider the commissary store in Europe, several thousand miles away from its source of supply, operating out of a WWII-era building constructed for another time and purpose, and occupying but 1,836 square feet of selling space. It's difficult to argue that the commissary store team in Wiesbaden is not sensitive to the needs of its patrons when it reports an astounding (some might say numbing) $639 as its average monthly FY84 sales for each of those 1,836 square feet. In short, the figures presented here also indicate the efficiency and productivity of the various commissary services. In the absence of rhetoric they clearly demonstrate why commissary stores are among the most cost-effective government investments of taxpayer dollars. The commissary systems do not cost, they pay.

Since the five-percent commissary surcharge is excluded from the figures reported by *Interservice* there is another way to demonstrate the true dimensions of commissary service and savings. Army commissary patrons, for example, saved roughly $48.4 million in FY84 by taking advantage of voluntary price reductions on special promotional items, by redeeming manufacturers' cents-off coupons, and by shopping at locally sponsored warehouse caselot sales. The savings represented four percent of total Army FY84 grocery sales, which means that for every five cents paid in surcharge, four cents were returned to patrons through extra savings. Comparable figures from the Air Force, Navy and Marine Corps also highlight the fact that, regardless of their service stripe, patrons everywhere enjoy additional price savings to largely offset their surcharge payments.

Also published for the first time with this report is a by-service breakdown of how FY84 surcharge dollars were expended for construction programs, operating and office supplies, utilities, maintenance and services, and store equipment. Many who do not understand the commissary systems are unaware that these expense items are paid for by the systems themselves. The table published in *Interservice* will serve as a valuable aid in dispelling this and other erroneous myths. ■

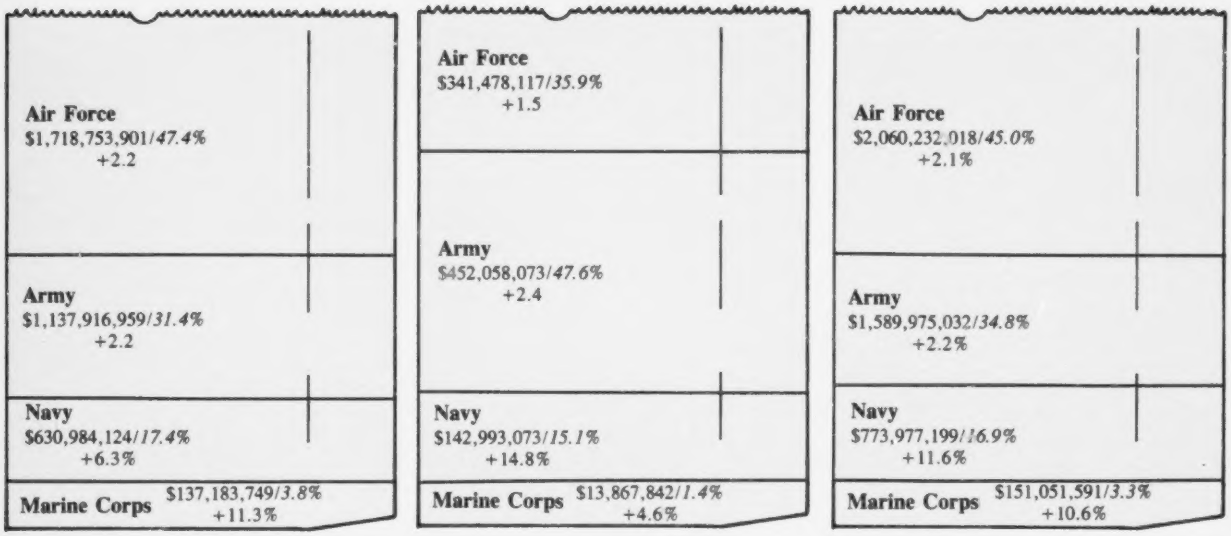
The ALA is indebted to the four service branches covered in this report for their invaluable cooperation and assistance. The data reported are from official sources at the Air Force Commissary Service, Marine Corps headquarters, Navy Resale and Services Support Office, and U.S. Army Troop Support Agency.

# All-Service Commissary Sales—FY84

**CONUS**
**$3,624,838,733**
*(=100%)*

**Overseas**
**$950,397,107**
*(=100%)*

**Worldwide**
**$4,575,235,840**
*(=100%)*



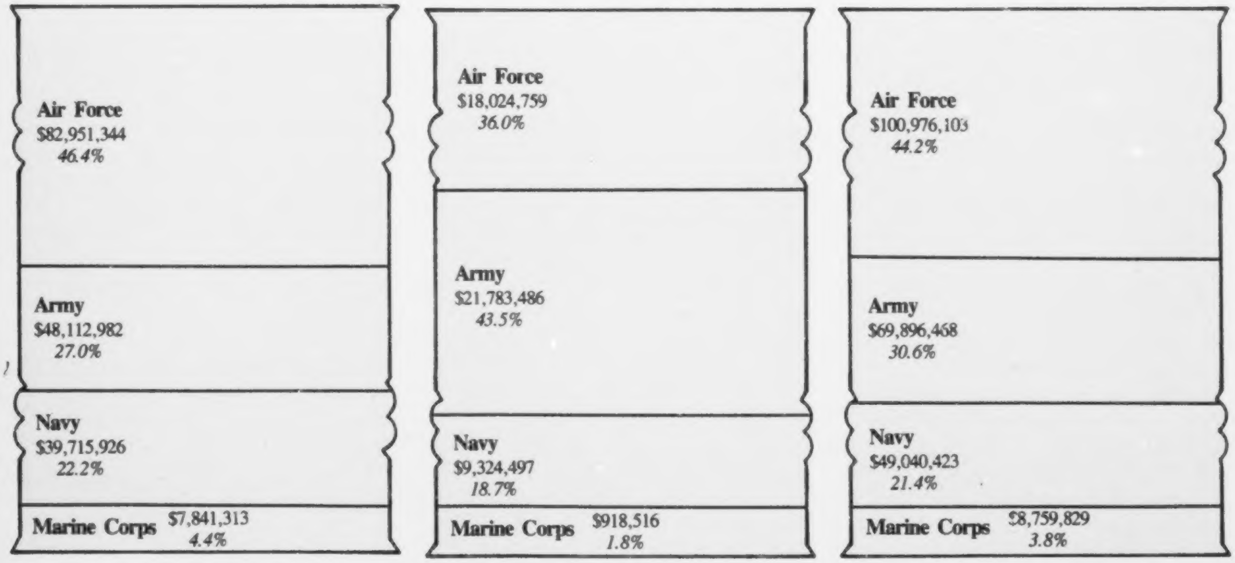
*Note:* The percent figures shown in italics represent the respective sales shares of total worldwide commissary sales. The remaining percent figures shown represent sales changes versus FY83.

# All-Service Commissary Grocery Sales Distribution—FY84

**CONUS**
**$178,621,565**
*(=100%)*

**Overseas**
**$50,051,258**
*(=100%)*

**Worldwide**
**$228,672,823**
*(=100%)*

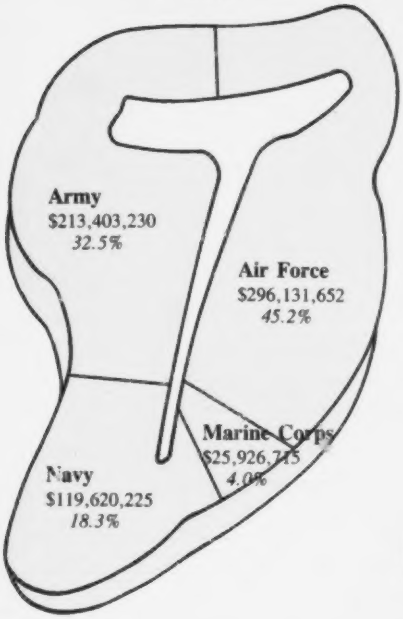


## All-Service Commissary Meat Sales Distribution—FY84

**CONUS**

**$655,081,822**

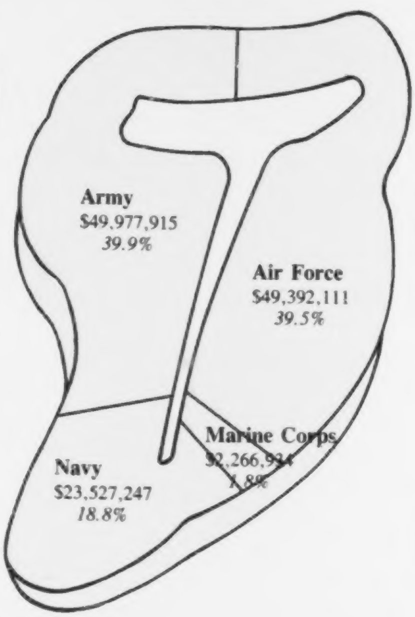
*(=100%)*



**Overseas**

**$125,164,207**

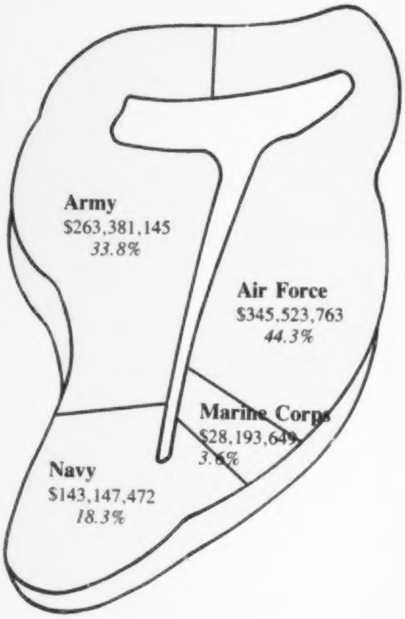
*(=100%)*



**Worldwide**

**$780,246,029**

*(=100%)*

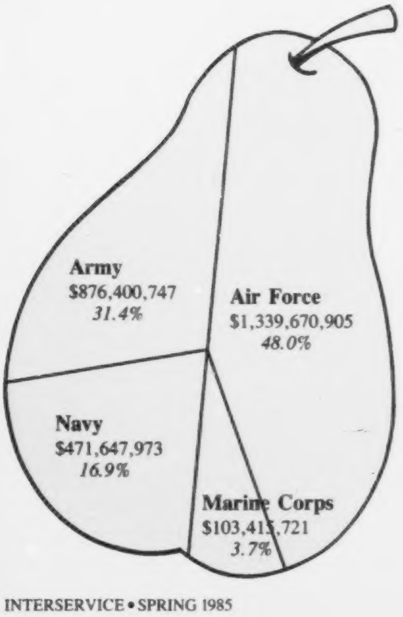


## All-Service Commissary Produce Sales Distribution—FY84

**CONUS**

**$2,791,135,346**

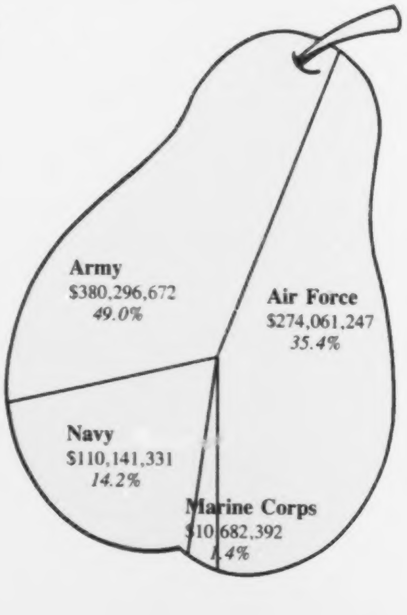
*(=100%)*



**Overseas**

**$775,181,642**

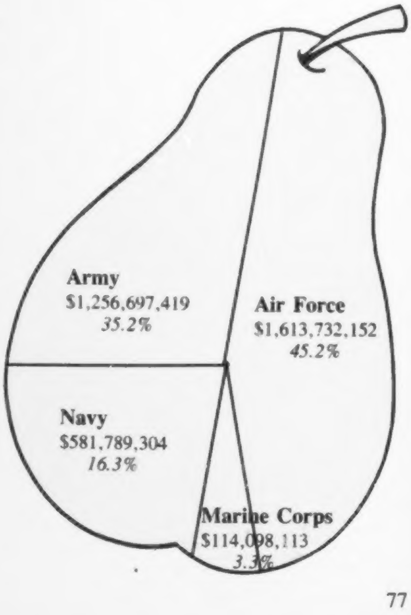
*(=100%)*



**Worldwide**

**$3,566,316,988**

*(=100%)*



# All-Service Commissary Coupon Redemptions — FY84

## CONUS

| | Number | % Share CONUS | % Share Worldwide | $ Value | % Share CONUS | % Share Worldwide |
|---|---|---|---|---|---|---|
| Air Force | 70,109,327 | 48.5 | 46.6 | 20,332,458 | 51.7 | 49.9 |
| Army | 41,800,000 | 28.9 | 27.8 | 10,486,057 | 26.7 | 25.7 |
| Navy | 27,959,492 | 19.4 | 18.5 | 7,190,556 | 18.3 | 17.6 |
| Marine Corps | 4,664,133 | 3.2 | 3.1 | 1,292,744 | 3.3 | 3.2 |
| **CONUS Totals** | **144,532,952** | **100.0%** | **96.0%** | **$39,301,815** | **100.0%** | **96.4%** |

## Overseas

| | Number | % Share Overseas | % Share Worldwide | $ Value | % Share Overseas | % Share Worldwide |
|---|---|---|---|---|---|---|
| Air Force | 3,580,943 | 60.0 | 2.4 | 945,273 | 65.0 | 2.3 |
| Army | 1,700,000 | 28.5 | 1.1 | 331,071 | 22.7 | .8 |
| Navy | 436,604 | 7.3 | 0.3 | 110,899 | 7.6 | .3 |
| Marine Corps | 254,133 | 4.2 | 0.2 | 68,877 | 4.7 | .2 |
| **Overseas Totals** | **5,971,680** | **100.0%** | **4.0%** | **$1,456,120** | **100.0%** | **3.6%** |

## Worldwide

| | Number | | % Share Worldwide | $ Value | | % Share Worldwide |
|---|---|---|---|---|---|---|
| Air Force | 73,690,270 | – | 48.9 | 21,277,733 | – | 52.2 |
| Army | 43,500,000 | – | 28.9 | 10,817,128 | – | 26.5 |
| Navy | 28,396,096 | – | 18.9 | 7,301,455 | – | 17.9 |
| Marine Corps | 4,918,580 | – | 3.3 | 1,361,621 | – | 3.3 |
| **Worldwide Totals** | **150,504,946** | **–** | **100.0%** | **$40,757,937** | **–** | **.00.0%** |

**Note:** Data reported for Army commissaries do not reflect actual geographic distribution of coupon redemptions since official figures are reported by commissary region, with many stores in certain regions actually operating overseas but reported in CONUS data, and vice-versa.

# All-Service Commissary Surcharge Expense Distribution—FY84

| **Total surcharge sales dollars** | **AFCOMS**<br>**$99,866,000** | **USATSA**<br>**$78,100,000** | **NAVRESSO**<br>**$38,718,637** | **Marine Corps**<br>**$7,915,000** |
|---|---|---|---|---|
| **% surcharge $ distributed to:** | | | | |
| Construction | 36.3 | 18.4 | 21.8 | 38.4 |
| Operating & office supplies | 18.9 | 16.5 | 16.4 | 21.7 |
| Utilities | 13.1 | 12.3 | 22.2 | 20.7 |
| Maintenance & services | 9.2 | 14.9 | 14.8 | 18.4 |
| Store equipment | 10.7 | 13.6 | 23.8 | 0.8 |
| **Total** | **88.2%** [1] | **75.7%** [2] | **100.0%** | **100.0%** |

**Notes:** Details may not add to 100 percent due to rounding. Expense from transportation, linens/uniforms, and other like expense items is included in data for maintenance & services. Surcharge sales dollars exclude revenue from other sources (e.g., salvage and cardboard sales and cash discounts from suppliers).

[1] The difference of 11.8 percent represents obligated surcharge funds carried forward to FY85.

[2] The difference of 24.3 percent represents unobligated surcharge funds totaling $19 million. The U.S. Army Troop Support Agency plans to obligate these funds to future store construction programs.

# Air Force Commissary Coupon Redemptions — FY84

## CONUS

| Complex | Number | % Share CONUS | % Share Worldwide | $ Value | % Share CONUS | % Share Worldwide |
|---|---|---|---|---|---|---|
| Cal-Nev | 5,122,112 | 7.3 | 7.0 | 1,511,947 | 7.4 | 7.1 |
| Capital Area | 6,936,816 | 9.9 | 9.4 | 1,949,462 | 9.6 | 9.2 |
| Delta | 3,145,519 | 4.5 | 4.3 | 964,935 | 4.7 | 4.5 |
| Gulf Area | 4,289,614 | 6.1 | 5.8 | 1,269,288 | 6.2 | 6.0 |
| North Central | 3,527,315 | 5.0 | 4.8 | 996,196 | 4.9 | 4.7 |
| Northeast | 3,250,792 | 4.6 | 4.4 | 996,947 | 4.9 | 4.7 |
| Northern California | 4,244,109 | 6.1 | 5.8 | 1,201,321 | 5.9 | 5.6 |
| Northwest | 4,685,690 | 6.7 | 6.4 | 1,371,687 | 6.8 | 6.4 |
| Ohio Valley | 5,400,124 | 7.7 | 7.3 | 1,571,377 | 7.7 | 7.5 |
| Rocky Mountain | 3,881,615 | 5.6 | 5.3 | 1,086,893 | 5.4 | 5.4 |
| South Central | 5,491,656 | 7.8 | 7.5 | 1,561,940 | 7.7 | 7.3 |
| South Florida | 5,597,819 | 8.0 | 7.6 | 1,627,232 | 8.0 | 7.7 |
| South Texas | 6,115,212 | 8.7 | 8.3 | 1,801,410 | 8.9 | 8.5 |
| Southeast | 3,487,316 | 5.0 | 4.7 | 984,690 | 4.8 | 4.6 |
| Southwest | 4,933,618 | 7.0 | 6.7 | 1,437,133 | 7.1 | 6.8 |
| **CONUS Totals** | **70,109,327** | **100.0%** | **95.3%** | **$20,332,458** | **100.0%** | **96.0%** |
| **Overseas** | | | | | | |
| Alaska | 423,069 | 11.8 | .6 | 114,458 | 12.1 | .5 |
| *Andersen AFB, Guam* | 93,237 | 2.6 | .1 | 24,731 | 2.6 | .1 |
| *Ankara, Turkey* | 9,378 | .3 | A | 2,581 | .3 | A |
| *Aviano AB, Italy* | 21,764 | .6 | A | 5,481 | 6 | A |
| *Camp New Amsterdam, NL* | 26,414 | .6 | A | 6,307 | .7 | A |
| Central UK | 84,708 | 2.4 | .1 | 21,031 | 2.2 | .1 |
| *Clark AB, Philippines* | 211,625 | 5.9 | .3 | 54,076 | 5.7 | .3 |
| Eastern UK | 199,373 | 5.6 | .3 | 50,837 | 5.3 | .2 |
| Frankfurt Area | 177,710 | 5.0 | .2 | 44,636 | 4.7 | .1 |
| Greece | 40,266 | 1.1 | .5 | 10,241 | 1.1 | A |
| *Hickam AFB, HI* | 857,452 | 23.9 | 1.2 | 247,307 | 26.2 | 1.2 |
| *Incirlik CDI, Turkey* | 26,208 | .7 | A | 6,558 | .7 | A |
| *Izmir, Turkey* | 10,143 | .3 | A | 2,709 | .3 | A |
| Kaiserslautern Area | 373,135 | 10.4 | .5 | 93,079 | 9.8 | .4 |
| *Lajes Field, Azores* | 30,081 | .8 | A | 7,804 | .8 | A |
| *Misawa, Japan* | 74,510 | 2.1 | .1 | 18,456 | 2.0 | .1 |
| Okinawa | 356,976 | 10.0 | .4 | 91,665 | 9.7 | .4 |
| *Osan AB, Korea* | 60,295 | 1.7 | .5 | 17,758 | 1.9 | .1 |
| *San Vito AS, Italy* | 11,941 | .3 | A | 3,146 | .3 | A |
| Spain | 81,851 | 2.3 | .1 | 20,421 | 2.2 | .1 |
| Trier Area | 139,292 | 3.9 | .2 | 34,071 | 3.6 | .2 |
| Western UK | 131,719 | 3.7 | .2 | 32,769 | 3.5 | .2 |
| *Yokota AB, Japan* | 139,796 | 3.9 | .2 | 35,151 | 3.7 | .2 |
| **Overseas Totals** | **3,580,943** | **100.0%** | **4.7%** | **$945,273** | **100.0%** | **4.0%** |
| **Worldwide Totals** | **73,690,270** | | **100.0%** | **$21,277,733** | | **100.0%** |

**Note:** Overseas stand-alone stores are shown in italics. All other data are for store complex areas. Details may not add to totals due to rounding. **A** – Less than one-tenth of one percent.

# Air Force Announces Plans to Realign Complexes

The Air Force Commissary Service (AFCOMS) in February announced plans to consolidate its 15 complexes in the continental US and one in Alaska into eight new regions over the next two years. The realignment will transfer about 150 AFCOMS personnel from complex offices into commissary stores, putting "more people where we need them," AFCOMS commander Maj. Gen. M. Gary Alkire said. In addition, it was announced that the AFCOMS Pacific Region headquarters, currently located at Norton AFB, CA, is being moved to Hawaii (the exact location was not known as *Interservice* went to press, but military sources suggest it will be Hickam AFB).

Between seven to 14 stores will fall under the responsibility of each new region under the plans AFCOMS will begin to implement next month. All regional phase-ins are expected to be completed before October next year.

No announcements naming the eight new regional directors are expected before mid-summer 1985. AFCOMS headquarters next month will begin interviewing all current complex directors and others who apply for the new region positions.

The following is an at-a-glance profile of what the new AFCOMS regions likely will resemble (final configurations may differ after completion of required environmental impact analysis studies):

### California Region

*Location:* Norton AFB, CA
*Stores:* 12
*Annual Sales:* $223,000,000
*Personnel:* 991.2
*Commissary Stores:*
Beale AFB, CA
Castle AFB, CA
Edwards AFB, CA
George AFB, CA
Los Angeles AFS, CA
March AFB, CA
Mather AFB, CA
McClellan AFB, CA
Nellis AFB, NV
Norton AFB, CA
Travis AFB, CA
Vandenberg AFB, CA

### Delta-Gulf Region

*Location:* Maxwell AFB, AL
*Stores:* 14
*Annual Sales:* $228,000,000
*Personnel:* 1,031.4
*Commissary Stores:*
Arnold AFB, TN
Barksdale AFB, LA
Blytheville AFB, AR
Columbus AFB, MS
Eglin AFB, FL
England AFB, LA
Gunter AFB, AL
Hurlburt AFB, FL
Keesler AFB, MS
Little Rock AFB, AR
Maxwell AFB, AL
Moody AFB, GA
Robins AFB, GA
Tyndall AFB, FL

### North Central Region

*Location:* Offutt AFB, NE
*Stores:* 13
*Annual Sales:* $185,000,000
*Personnel:* 894.4
*Commissary Stores:*
Chanute AFB, IL
Ellsworth AFB, SD
Grand Forks AFB, MN
Grissom AFB, IN
K.I. Sawyer AFB, MI
McConnell AFB, KS
Minot AFB, ND
Offutt AFB, NE
Scott AFB, IL
Warren AFB, WY
Whiteman AFB, MO
Wright-Patterson AFB, OH
Wurtsmith AFB, MI

### Northeast Region

*Location:* Langley AFB, VA
*Stores:* 10
*Annual Sales:* $190,000,000
*Personnel:* 862
*Commissary Stores:*
Andrews AFB, MD
Bolling AFB, DC
Dover AFB, DE
Griffiss AFB, NY
Hanscom AFB, MA
Langley AFB, VA
Loring AFB, ME
McGuire AFB, NJ
Pease AFB, NH
Plattsburgh AFB, NY

### South Central Region

*Location:* McChord AFB, WA
*Stores:* 7
*Annual Sales:* $132,000,000
*Personnel:* 612.6
*Commissary Stores:*
Eielson AFB, AK
Elmendorf AFB, AK
Fairchild AFB, WA
Hill AFB, UT
Malmstrom AFB, MT
McChord AFB, WA
Mountain Home AFB, ID

### Northwest Region

*Location:* Lackland AFB, TX
*Stores:* 13
*Annual Sales:* $242,000,000
*Personnel:* 988.8
*Commissary Stores:*
Altus AFB, OK
Bergstrom AFB, TX
Brooks AFB, TX
Carswell AFB, TX
Dyess AFB, TX
Goodfellow AFB, TX
Kelly AFB, TX
Lackland AFB, TX
Laughlin AFB, TX
Randolph AFB, TX
Sheppard AFB, TX
Tinker AFB, OK
Vance AFB, OK

### Southeast Region

*Location:* Charleston AFB, SC
*Stores:* 7
*Annual Sales:* $156,000,000
*Personnel:* 688.6
*Commissary Stores:*
Charleston AFB, SC
Homestead AFB, FL
MacDill AFB, FL
Myrtle Beach AFB, SC
Patrick AFB, FL
Shaw AFB, SC
Seymour Johnson AFB, NC

### Southwest Region

*Location:* Luke AFB, AZ
*Stores:* 11
*Annual Sales:* $181,000,000
*Personnel:* 793.4
*Commissary Stores:*
Cannon AFB, NM
Davis-Monthan AFB, AZ
Holbrook AFB, AZ
Holloman AFB, NM
Kirtland AFB, NM
Lowry AFB, CO
Luke AFB, AZ
Peterson AFB, CO
Reese AFB, TX
USAF Academy, CO
Williams AFB, AZ

> **"We're putting more people where we need them."**
> —Maj. Gen. M. Gary Alkire Commander, AFCOMS

# Air Force Commissary Sales — FY84

## Analysis of Sales by Store and Complex (Continental United States)

### Cal-Nev Complex

| Store | Store Class | Total Store $ Sales | % of Store Total |  |  | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
|  |  |  | Grocery | Meat | Produce |  |  |  |  |
| Edwards AFB, CA | 6 | $ 12,177,635 | 77 | 17 | 6 | +5.0 | 21,140 | 48 | 0.34 |
| George AFB, CA | 6 | 13,210,602 | 79 | 17 | 4 | +2.7 | 14,300 | 77 | 0.36 |
| Indian Springs Fld, NV | 1 | 494,881 | 84 | 13 | 3 | −2.6 | 1,875 | 22 | 0.01 |
| Los Angeles AFS, CA | 5 | 11,162,575 | 79 | 17 | 4 | +515.0 | 27,360 | 34 | 0.31 |
| March AFB, CA | 8 | 24,541,619 | 78 | 17 | 5 | +4.1 | 22,230 | 92 | 0.68 |
| Nellis AFB, CA | 8 | 33,860,818 | 79 | 16 | 5 | +6.3 | 27,940 | 101 | 0.93 |
| Norton AFB, CA | 8 | 25,472,870 | 78 | 18 | 4 | −0.1 | 24,685 | 86 | 0.70 |
| Vandenberg AFB, CA | 6 | 17,778,899 | 78 | 18 | 4 | +1.7 | 24,695 | 60 | 0.49 |
| **Complex Totals** |  | **$138,699,899** | **78** | **17** | **5** | **+10.8** | **164,225** | **$ 70** | **3.83** |

### Capital Area Complex

| Store | Store Class | Total Store $ Sales | % of Store Total |  |  | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
|  |  |  | Grocery | Meat | Produce |  |  |  |  |
| Andrews AFB, MD | 8 | $ 37,070,553 | 77 | 18 | 5 | +4.2 | 29,995 | 103 | 1.02 |
| Bolling AFB, DC | 7 | 19,685,270 | 76 | 18 | 6 | +2.6 | 24,485 | 67 | 0.54 |
| Dover AFB, DE | 7 | 18,036,434 | 78 | 18 | 4 | +1.8 | 25,475 | 59 | 0.50 |
| Langley AFB, VA | 8 | 36,157,825 | 76 | 18 | 6 | +4.6 | 27,395 | 110 | 1.00 |
| McGuire AFB, NJ | 8 | 44,721,034 | 79 | 17 | 4 | +7.5 | 40,510 | 92 | 1.23 |
| **Complex Totals** |  | **$155,671,116** | **77** | **18** | **5** | **+3.5** | **147,860** | **$ 88** | **4.29** |

### Delta Complex

| Store | Store Class | Total Store $ Sales | % of Store Total |  |  | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
|  |  |  | Grocery | Meat | Produce |  |  |  |  |
| Barksdale AFB, LA | 8 | $36,706,238 | 78 | 17 | 5 | −0.7 | 29,990 | 102 | 1.01 |
| Blytheville AFB, AR | 4 | 8,737,086 | 78 | 18 | 4 | +3.1 | 11,030 | 66 | 0.24 |
| England AFB, LA | 6 | 13,472,815 | 77 | 18 | 5 | +1.4 | 13,690 | 82 | 0.37 |
| Little Rock AFB, AR | 8 | 30,372,111 | 78 | 18 | 4 | +0.1 | 29,430 | 86 | 0.84 |
| **Complex Totals** |  | **$89,288,250** | **78** | **17** | **5** | **+0.2** | **84,140** | **$ 88** | **2.46** |

**Notes:** Sales data in this special *Interservice* report exclude the 5 percent commissary surcharge.

Sales classifications for Air Force commissaries are based upon total average monthly sales, as follows:
Class 1 Up to $100,000
Class 2 $100,001-$300,000
Class 3 $300,001-$500,000
Class 4 $500,001-$750,000
Class 5 $750,001-$1,000,000
Class 6 $1,000,001-$1,500,000
Class 7 $1,500,001-$2,000,000
Class 8 Over $2,000,000

The ACV (All Commodity Volume) analysis shows each individual commissary or complex FY84 sales total as a percentage of separately combined CONUS and overseas sales of all Army, Air Force, Marine Corps and Navy commissaries. Sales at commissaries in Alaska, Hawaii, Puerto Rico and other locations not contiguous with the 48 continental United States are classed and reported "Overseas." The ACV given for "Worldwide Totals" represents the percent sales share of commissaries operated by that service branch against the FY84 worldwide sales reported for *all* service branches.

# Air Force Commissary Sales — FY84

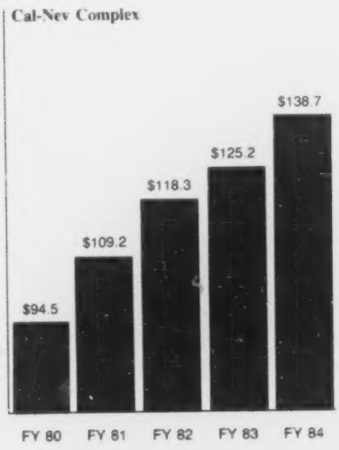
## Gulf Area Complex

| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| Arnold AFS, TN | 3 | $ 3,938,600 | 83 | 14 | 3 | +1.0 | 8,205 | 40 | 0.11 |
| Columbus AFB, MS | 5 | 10,413,075 | 77 | 19 | 4 | +1.1 | 17,015 | 51 | 0.29 |
| Eglin AFB, FL | 8 | 30,800,569 | 77 | 17 | 6 | +2.6 | 24,680 | 104 | 0.85 |
| Gunter AFS, AL | 6 | 13,168,687 | 77 | 18 | 5 | −0.5 | 16,885 | 65 | 0.36 |
| Hurlburt Field, FL | 5 | 11,886,712 | 79 | 16 | 5 | −0.6 | 11,520 | 86 | 0.33 |
| Keesler AFB, MS | 8 | 29,966,732 | 77 | 18 | 5 | +2.9 | 30,830 | 81 | 0.83 |
| Maxwell AFB, AL | 7 | 18,382,351 | 78 | 18 | 4 | +1.4 | 20,985 | 73 | 0.51 |
| Tyndall AFB, FL | 7 | 20,452,199 | 77 | 18 | 5 | +2.8 | 29,385 | 58 | 0.56 |
| **Complex Totals** | | **$139,008,925** | **77** | **18** | **5** | **+1.8** | **159,505** | **$ 73** | **3.83** |

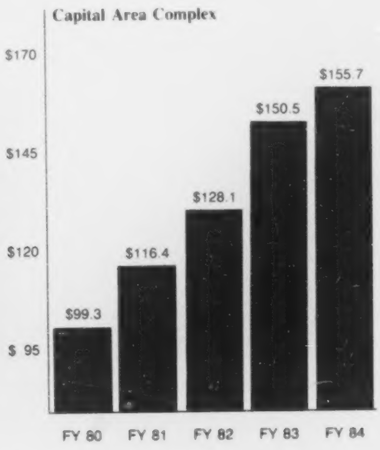
**Notes:** Sales data in this special *Interservice* report exclude the 5 percent commissary surcharge

The ACV (All Commodity Volume) analysis shows each individual commissary or complex FY84 sales total as a percentage of separately combined CONUS and overseas sales of all Army, Air Force, Marine Corps and Navy commissaries. Sales at commissaries in Alaska, Hawaii, Puerto Rico and other locations not contiguous with the 48 continental United States are classed and reported "Overseas." The ACV given for "Worldwide Totals" represents the percent sales share of commissaries operated by that service branch against the FY84 worldwide sales reported for *all* service branches

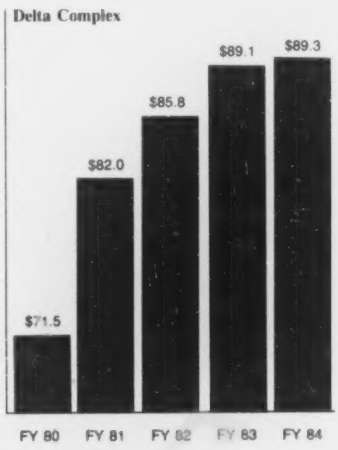
**5-Year Total Sales Summary – (AFCOMS)/$ Millions**



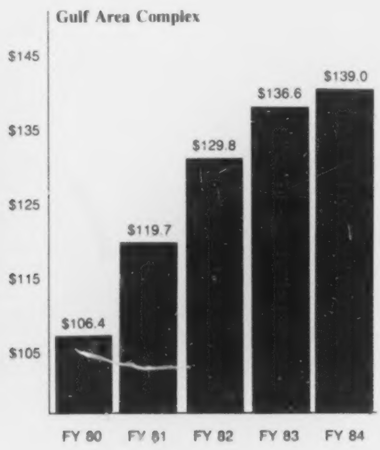
**5-Year Total Sales Summary – (AFCOMS)/$ Millions**



**5-Year Total Sales Summary – (AFCOMS)/$ Millions**



**5-Year Total Sales Summary – (AFCOMS)/$ Millions**



## It's A Fact!

Do you know which are the 20 *overseas* military commissaries reporting the highest FY84 total store sales?

1. Pearl Harbor, HI (*$48,615,893*)
2. Yongsan, Korea (*$39,348,077*)
3. Hickam AFB, HI (*$31,089,234*)
4. Schofield Barracks, HI (*$30,162,216*)
5. Elmendorf AFB, AK (*$27,940,488*)
6. Clark AB, Philippines (*$27,275,117*)
7. Ft. Buchanan, PR (*$24,862,351*)
8. Kadena AB, Japan (*$20,951,853*)
9. Ramstein AB, FRG (*$20,330,695*)
10. Osan AB, Korea (*$19,154,950*)

11. Guam (*$16,537,771*)
12. Frankfurt, FRG (*$15,727,350*)
13. Corozal, Panama (*$15,305,471*)
14. Andersen AFB, Guam (*$14,694,103*)
15. Fuerth, FRG (*$14,123,404*)
16. Wiesbaden, FRG (*$14,088,702*)
17. Vogelweh, FRG (*$14,020,543*)
18. RAF Lakenheath, UK (*$13,916,548*)
19. Yokota AB, Japan (*$13,398,359*)
20. Heidelberg, FRG (*$12,697,483*)

# Air Force Commissary Sales — FY84

## North Central Complex

| Store | Store Class | Total Store $ Sales | % of Store Total Grocery | Meat | Produce | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| Calumet AFS, MI | 1 | $ 347,641 | 91 | 5 | 4 | −2.2 | 1,705 | 17 | 0.01 |
| Ellsworth AFB, SD | 6 | 13,160,773 | 79 | 16 | 5 | −1.4 | 17,980 | 61 | 0.36 |
| Grand Forks AFB, ND | 5 | 9,269,508 | 78 | 17 | 5 | +3.5 | 16,095 | 48 | 0.26 |
| K.I. Sawyer AFB, MI | 5 | 9,021,972 | 75 | 19 | 6 | +0.3 | 17,900 | 42 | 0.25 |
| Minot AFB, ND | 5 | 9,204,300 | 80 | 16 | 4 | −0.5 | 13,460 | 57 | 0.25 |
| Offutt AFB, NE | 8 | 33,993,801 | 79 | 16 | 5 | −1.5 | 33,330 | 85 | 0.94 |
| **Complex Totals** | | **$74,997,995** | **78** | **17** | **5** | **−0.6** | **100,470** | **$ 62** | **2.07** |

## Northeast Complex

| Store | Store Class | Total Store $ Sales | % of Store Total Grocery | Meat | Produce | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| Griffiss AFB, NY | 6 | $14,048,666 | 79 | 16 | 5 | +15.2 | 15,405 | 76 | 0.39 |
| Hanscom AFB, MA | 7 | 19,415,571 | 79 | 16 | 5 | +2.8 | 32,360 | 50 | 0.54 |
| Loring AFB, ME | 4 | 7,645,788 | 80 | 14 | 6 | +5.6 | 12,745 | 50 | 0.21 |
| North Truro AFS, MA | 1 | 609,274 | 89 | 8 | 3 | −6.4 | 2,540 | 20 | 0.02 |
| Pease AFB, NH | 7 | 19,200,958 | 82 | 15 | 3 | +1.7 | 25,400 | 63 | 0.53 |
| Plattsburgh AFB, NY | 5 | 10,304,318 | 81 | 14 | 5 | +2.9 | 19,970 | 43 | 0.28 |
| **Complex Totals** | | **$71,224,575** | **80** | **15** | **5** | **−4.5** | **108,420** | **$ 55** | **1.96** |

**Notes:** Sales data in this special *Interservice* report exclude the 5 percent commissary surcharge

The ACV (All Commodity Volume) analysis shows each individual commissary or complex FY84 sales total as a percentage of separately combined CONUS and overseas sales of all Army, Air Force, Marine Corps and Navy commissaries. Sales at commissaries in Alaska, Hawaii, Puerto Rico and other locations not contiguous with the 48 continental United States are classed and reported "Overseas." The ACV given for "Worldwide Totals" represents the percent sales share of commissaries operated by that service branch against the FY84 worldwide sales reported for *all* service branches.

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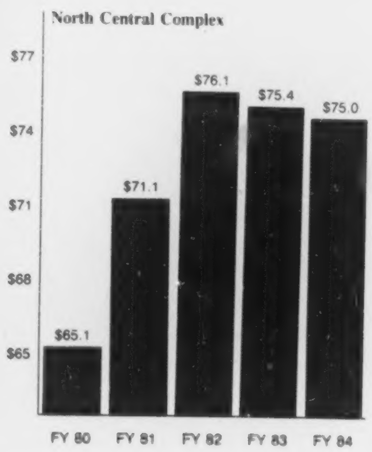
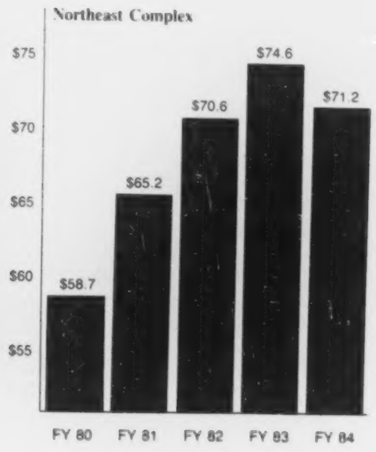
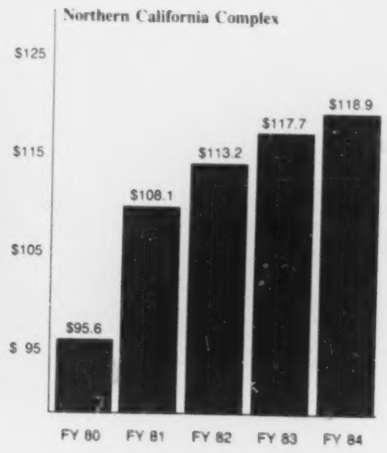
5-Year Total Sales Summary – (AFCOMS)/$ Millions



5-Year Total Sales Summary – (AFCOMS)/$ Millions



5-Year Total Sales Summary – (AFCOMS)/$ Millions



# Air Force Commissary Sales — FY84

## Northern California Complex

| Store | Store Class | Total Store $ Sales | % of Store Total Grocery | Meat | Produce | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| Beale AFB, CA | 6 | $ 13,902,176 | 77 | 19 | 4 | +2.6 | 13,320 | 87 | 0.38 |
| Castle AFB, CA | 7 | 18,064,391 | 78 | 18 | 4 | +1.2 | 23,160 | 65 | 0.50 |
| Mather AFB, CA | 8 | 32,147,471 | 76 | 18 | 6 | +0.9 | 30,445 | 88 | 0.89 |
| McClellan AFB, CA | 7 | 23,824,976 | 77 | 18 | 5 | +2.2 | 21,350 | 93 | 0.66 |
| Travis AFB, CA | 8 | 30,982,660 | 76 | 19 | 5 | −0.4 | 26,895 | 96 | 0.85 |
| **Complex Totals** | | **$118,921,674** | **77** | **18** | **5** | **+1.1** | **115,170** | **$ 86** | **3.28** |

## Northwest Complex

| Store | Store Class | Total Store $ Sales | % of Store Total Grocery | Meat | Produce | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| Fairchild AFB, WA | 7 | $ 21,760,439 | 81 | 15 | 4 | +1.3 | 19,500 | 93 | 0.60 |
| Hill AFB, UT | 7 | 21,791,217 | 79 | 16 | 5 | +2.1 | 24,540 | 74 | 0.60 |
| Makah AFS, WA | 1 | 303,436 | 83 | 13 | 4 | +7.9 | 1,690 | 15 | 0.01 |
| Malmstrom AFB, MT | 5 | 11,567,361 | 80 | 16 | 4 | −1.8 | 17,215 | 56 | 0.32 |
| McChord AFB, WA | 8 | 46,431,307 | 77 | 18 | 5 | +0.4 | 34,245 | 113 | 1.28 |
| Mt. Home AFB, ID | 5 | 11,963,443 | 78 | 17 | 5 | +0.9 | 15,340 | 65 | 0.33 |
| **Complex Totals** | | **$113,817,203** | **79** | **16** | **5** | **+0.7** | **112,530** | **$ 84** | **3.14** |

**Notes:** Sales data in this special *Interservice* report exclude the 5 percent commissary surcharge.

The ACV (All Commodity Volume) analysis shows each individual commissary or complex FY84 sales total as a percentage of separately combined CONUS and overseas sales of all Army, Air Force, Marine Corps and Navy commissaries. Sales at commissaries in Alaska, Hawaii, Puerto Rico and other locations not contiguous with the 48 continental United States are classed and reported "Overseas." The ACV given for "Worldwide Totals" represents the percent sales share of commissaries operated by that service branch against the FY84 worldwide sales reported for *all* service branches.

## Air Force Commissary Complex Rankings by ACV CONUS and Overseas. . .based on FY84 sales

### CONUS

| Rank | Complex | ACV |
|---|---|---|
| 1 | Capital Area | 4.29 |
| 2 | South Texas | 4.19 |
| 3 | Gulf Area | 3.83 |
| 4 | Cal-Nev | 3.83 |
| 5 | South Central | 3.74 |
| 6 | Southwest | 3.46 |
| 7 | Northern California | 3.28 |
| 8 | Northwest | 3.14 |
| 9 | South Florida | 3.09 |
| 10 | Ohio Valley | 2.98 |
| 11 | Southeast | 2.70 |
| 12 | Delta | 2.46 |
| 13 | Rocky Mountain | 2.37 |
| 14 | North Central | 2.07 |
| 15 | Northeast | 1.96 |
| **Total Air Force CONUS ACV** | | **47.42** |

### Overseas

| Rank | Complex | ACV |
|---|---|---|
| * | *(See Note)* | 14.06 |
| 1 | United Kingdom | 4.77 |
| 2 | Okinawa | 4.22 |
| 3 | Kaiserslautern Area | 4.16 |
| 4 | Alaska | 3.76 |
| 5 | Frankfurt | 1.82 |
| 6 | Trier | 1.36 |
| 7 | Spain | 1.12 |
| 8 | Greece | 0.65 |
| **Total Air Force Overseas ACV** | | **35.93** |

**Note:** Totals may not add due to rounding.

* The ACV data for 14 non-complexed overseas commissary stores are combined and reported in this table so that the ACV total for all Air Force commissaries overseas approximates the true Air Force ACV share total for overall, all-service, overseas store activity.

## It's A Fact!

Do you know which are the top ten *overseas* military commissaries with the largest, single store (i.e., *excluding* annexes) square feet of sales area?

1. Kadena AB, Japan *(28,625)*
2. Clark AB, Philippines *(27,720)*
3. Ramstein AB, FRG *(26,895)*
4. Schofield Barracks, HI *(25,059)*
5. Pearl Harbor, HI *(24,641)*
6. Osan AB, Korea *(23,475)*
7. RAF Bentwaters, UK *(20,150)*
8. Torrejon AB, Spain *(19,855)*
9. Yongsan, Korea *(19,240)*
10. Heidelberg, FRG *(18,910)*

# Air Force Commissary Sales — FY84

## Ohio Valley Complex

| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| Chanute AFB, IL | 6 | $ 13,622,644 | 77 | 17 | 6 | +0.8 | 25,800 | 44 | 0.38 |
| Grissom AFB, IN | 4 | 8,845,444 | 79 | 17 | 4 | +1.2 | 19,925 | 37 | 0.24 |
| Port Austin AFS, MI | 1 | 312,665 | 87 | 11 | 2 | +4.6 | 1,630 | 16 | 0.01 |
| Scott AFB, IL | 8 | 25,645,434 | 76 | 18 | 6 | +0.7 | 27,050 | 79 | 0.71 |
| Whiteman AFB, MO | 5 | 10,325,295 | 80 | 16 | 4 | −0.1 | 18,705 | 46 | 0.28 |
| Wright-Patterson AFB, OH | 8 | 41,376,644 | 78 | 17 | 5 | +3.4 | 40,565 | 85 | 1.14 |
| Wurtsmith AFB, MI | 4 | 8,027,335 | 79 | 17 | 4 | +0.7 | 17,150 | 39 | 0.22 |
| **Complex Totals** | | **$108,155,461** | **78** | **17** | **5** | **+1.7** | **150,825** | **$ 60** | **2.98** |

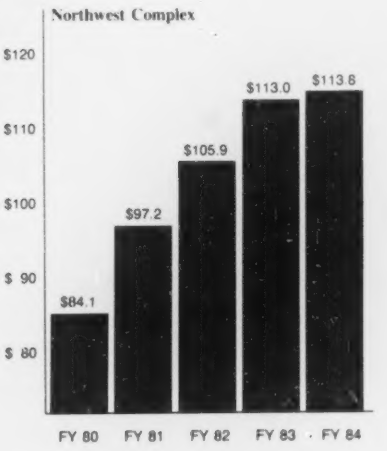
## Rocky Mountain Complex

| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| F.E. Warren AFB, WY | 5 | $10,710,651 | 79 | 17 | 4 | +2.0 | 14,170 | 63 | 0.30 |
| Lowry AFB, CO | 8 | 33,721,948 | 77 | 19 | 4 | −4.5 | 26,265 | 107 | 0.93 |
| Peterson AFB, CO | 8 | 25,289,126 | 77 | 17 | 6 | −0.6 | 22,910 | 92 | 0.70 |
| USAF Academy, CO | 6 | 16,110,356 | 77 | 17 | 6 | +8.9 | 16,575 | 81 | 0.44 |
| **Complex Totals** | | **$85,832,081** | **77** | **18** | **5** | **−0.2** | **79,920** | **$ 90** | **2.37** |

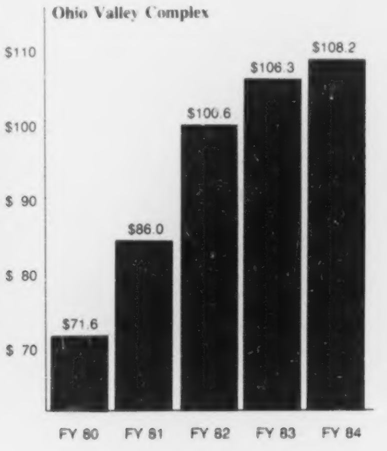
**Notes:** Sales data in this special *Interservice* report exclude the 5 percent commissary surcharge.

The ACV (All Commodity Volume) analysis shows each individual commissary or complex FY84 sales total as a percentage of separately combined CONUS and overseas sales of all Army, Air Force, Marine Corps and Navy commissaries. Sales at commissaries in Alaska, Hawaii, Puerto Rico and other locations not contiguous with the 48 continental United States are classed and reported "Overseas." The ACV given for "Worldwide Totals" represents the percent sales share of commissaries operated by that service branch against the FY84 worldwide sales reported for *all* service branches.

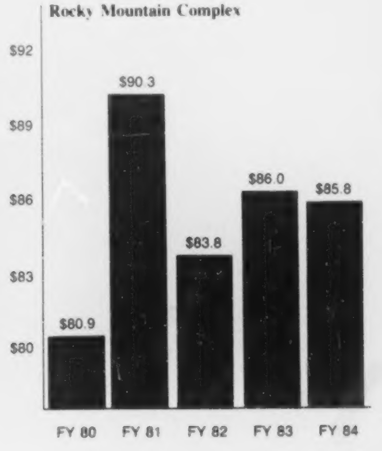
5-Year Total Sales Summary – (AFCOMS)/$ Millions



5-Year Total Sales Summary – (AFCOMS)/$ Millions



5-Year Total Sales Summary – (AFCOMS)/$ Millions



# Air Force Commissary Sales — FY84

## South Central Complex

| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| Altus AFB, OK | 5 | $ 9,246,824 | 79 | 16 | 5 | +1.5 | 10,560 | 73 | 0.26 |
| Carswell AFB, TX | 8 | 42,655,321 | 80 | 17 | 3 | +2.6 | 22,935 | 155 | 1.18 |
| McConnell AFB, KS | 6 | 16,143,730 | 79 | 17 | 4 | +0.7 | 24,915 | 54 | 0.45 |
| Reese AFB, TX | 4 | 7,669,727 | 78 | 17 | 5 | +2.7 | 16,390 | 39 | 0.21 |
| Sheppard AFB, TX | 7 | 18,701,278 | 77 | 17 | 6 | +3.8 | 31,170 | 50 | 0.51 |
| Tinker AFB, OK | 8 | 36,282,836 | 79 | 16 | 5 | +3.4 | 29,645 | 102 | 1.00 |
| Vance AFB, OK | 3 | 5,012,767 | 78 | 17 | 5 | +2.4 | 9,715 | 43 | 0.14 |
| **Complex Totals** | | **$135,712,483** | **79** | **17** | **4** | **+2.7** | **145,330** | **$ 78** | **3.74** |

## Southeast Complex

| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| Charleston AFB, SC | 8 | $26,769,641 | 78 | 16 | 4 | −1.4 | 26,560 | 84 | 0.74 |
| Fort Fisher AFS, NC | 1 | 773,323 | 89 | 10 | 1 | −7.1 | 3,225 | 20 | 0.02 |
| Moody AFB, GA | 5 | 10,765,627 | 77 | 18 | 5 | +1.3 | 17,590 | 51 | 0.30 |
| Myrtle Beach AFB, SC | 5 | 10,462,177 | 77 | 19 | 4 | +1.3 | 11,180 | 78 | 0.29 |
| Robins AFB, GA | 7 | 18,622,222 | 79 | 17 | 4 | −0.9 | 27,225 | 57 | 0.51 |
| Seymour Johnson AFB, NC | 6 | 15,354,524 | 77 | 18 | 5 | +1.9 | 17,290 | 74 | 0.42 |
| Shaw AFB, SC | 6 | 15,147,810 | 77 | 18 | 5 | +9.5 | 15,030 | 84 | 0.42 |
| **Complex Totals** | | **$97,895,324** | **78** | **18** | **4** | **+1.3** | **118,100** | **$ 69** | **2.70** |

## South Florida Complex

| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| Avon Park Range, FL | 1 | $ 240,482 | 81 | 15 | 4 | – | 801 | 25 | 0.01 |
| Homestead AFB, FL | 8 | 26,320,881 | 78 | 18 | 4 | −1.5 | 22,380 | 98 | 0.73 |
| MacDill AFB, FL | 8 | 53,052,964 | 80 | 16 | 4 | +3.8 | 26,960 | 164 | 1.46 |
| Patrick AFB, FL | 8 | 32,352,590 | 77 | 18 | 5 | +3.7 | 29,305 | 92 | 0.89 |
| **Complex Totals** | | **$111,966,917** | **79** | **17** | **4** | **+2.7** | **79,446** | **$117** | **3.09** |

**Notes:** Sales data in this special *Interservice* report exclude the 5 percent commissary surcharge.

The ACV (All Commodity Volume) analysis shows each individual commissary or complex FY84 sales total as a percentage of separately combined CONUS and overseas sales of all Army, Air Force, Marine Corps and Navy commissaries. Sales at commissaries in Alaska, Hawaii, Puerto Rico and other locations not contiguous with the 48 continental United States are classed and reported "Overseas." The ACV given for "Worldwide Totals" represents the percent sales share of commissaries operated by that service branch against the FY84 worldwide sales reported for *all* service branches.

## It's A Fact!

Do you know how many *CONUS* commissary stores were in operation in FY84? The oft-reported figure of 238 is probably your answer, but, in fact, in the *continental* United States, there were actually 229 stores in operation – and nine stores makes a big difference.

# Air Force Commissary Sales — FY84

## South Texas Complex

| Store | Store Class | Total Store $ Sales | % of Store Total: Grocery | Meat | Produce | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| Bergstrom AFB, TX | 8 | $ 32,283,375 | 76 | 18 | 6 | +2.3 | 25,380 | 106 | 0.89 |
| Brooks AFB, TX | 4 | 7,050,129 | 79 | 17 | 4 | +5.2 | 9,630 | 61 | 0.19 |
| Dyess AFB, TX | 6 | 15,671,550 | 77 | 17 | 6 | +2.1 | 16,125 | 81 | 0.43 |
| Goodfellow AFB, TX | 4 | 8,154,488 | 79 | 16 | 5 | +1.1 | 12,135 | 56 | 0.22 |
| Kelly AFB, TX | 5 | 10,097,382 | 77 | 19 | 4 | +17.7 | 15,585 | 54 | 0.28 |
| Lackland AFB, TX | 8 | 35,256,298 | 76 | 19 | 5 | −0.1 | 29,090 | 101 | 0.97 |
| Laughlin AFB, TX | 3 | 5,390,558 | 78 | 17 | 5 | +1.6 | 12,835 | 35 | 0.15 |
| Randolph AFB, TX | 8 | 38,126,801 | 76 | 19 | 5 | +8.4 | 33,445 | 95 | 1.05 |
| **Complex Totals** | | **$152,030,581** | **76** | **18** | **6** | **+4.1** | **154,225** | **$ 82** | **4.19** |

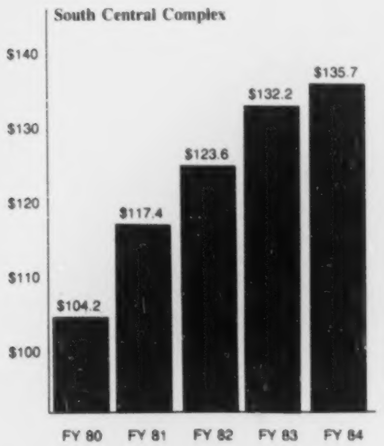
## Southwest Complex

| Store | Store Class | Total Store $ Sales | % of Store Total: Grocery | Meat | Produce | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| Cannon AFB, NM | 4 | $ 8,631,318 | 79 | 16 | 5 | −1.1 | 18,930 | 38 | 0.24 |
| Davis-Monthan AFB, AZ | 8 | 30,588,128 | 77 | 17 | 6 | +0.1 | 26,830 | 95 | 0.84 |
| Gila Bend AF Aux. Fld., AZ | 1 | 331,434 | 85 | 11 | 4 | +3.8 | 2,760 | 10 | 0.01 |
| Holbrook RBS, AZ | 1 | 154,155 | 87 | 13 | 0 | +16.2 | 535 | 24 | -0- |
| Holloman AFB, NM | 6 | 12,207,934 | 80 | 15 | 5 | +2.5 | 23,660 | 43 | 0.34 |
| Kirtland AFB, NM | 8 | 30,036,581 | 80 | 16 | 4 | +3.7 | 26,915 | 93 | 0.83 |
| Luke AFB, AZ | 8 | 27,117,628 | 79 | 16 | 5 | +3.3 | 26,590 | 85 | 0.75 |
| Williams AFB, AZ | 6 | 16,464,239 | 79 | 17 | 4 | −0.5 | 23,255 | 59 | 0.45 |
| **Complex Totals** | | **$125,531,417** | **79** | **16** | **5** | **+1.7** | **149,475** | **$ 70** | **3.46** |

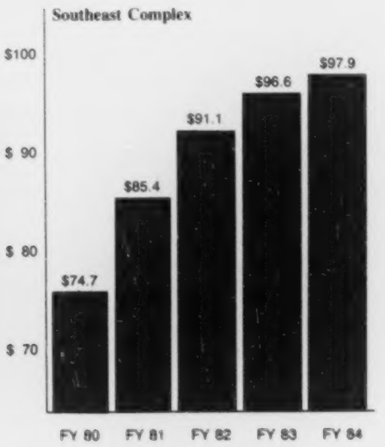
**Notes:** Sales data in this special *Interservice* report exclude the 5 percent commissary surcharge

The ACV (All Commodity Volume) analysis shows each individual commissary or complex FY84 sales total as a percentage of separately combined CONUS and overseas sales of all Army, Air Force, Marine Corps and Navy commissaries. Sales at commissaries in Alaska, Hawaii, Puerto Rico and other locations not contiguous with the 48 continental United States are classed and reported "Overseas." The ACV given for "Worldwide Totals" represents the percent sales share of commissaries operated by that service branch against the FY84 worldwide sales reported for all service branches.

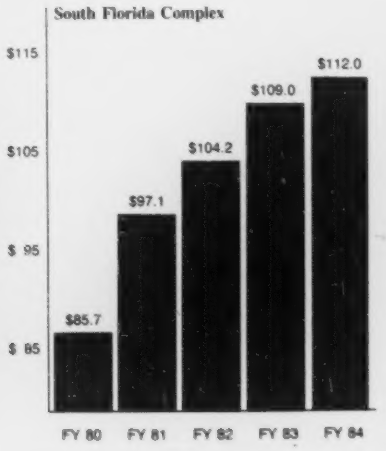
**5-Year Total Sales Summary – (AFCOMS)/$ Millions**



**5-Year Total Sales Summary – (AFCOMS)/$ Millions**

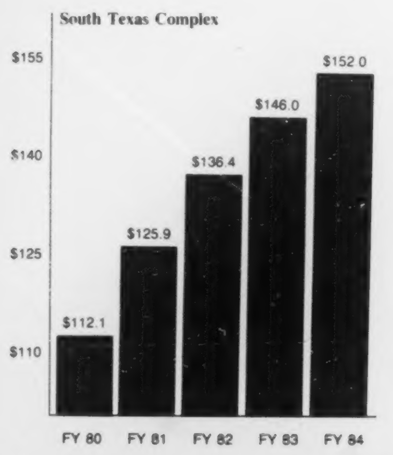


**5-Year Total Sales Summary – (AFCOMS)/$ Millions**

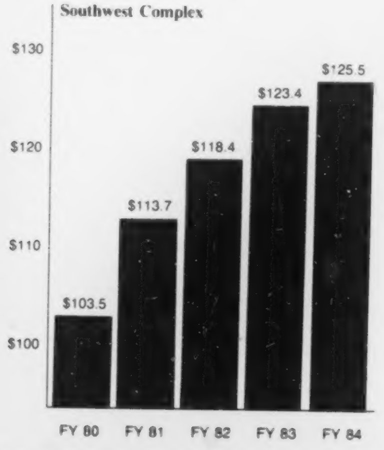


# Air Force Commissary Sales — FY84

5-Year Total Sales Summary—(AFCOMS)/$ Millions



5-Year Total Sales Summary—(AFCOMS)/$ Millions



## It's A Fact!

Did you know that the combined sales areas of all military commissaries worldwide last year totaled 6,322,384 square feet? In other words, military patrons last year shopped a sales area spanning 140 football fields!

## Totals

| | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|
| | | Grocery | Meat | Produce | | | | |
| **CONUS Totals** | **$1,718,753,901** | **78%** | **17%** | **5%** | **+2.2%** | **1,869,641** | **$ 77** | **47.42%** |

**Notes:** Sales data in this special *Interservice* report exclude the 5 percent commissary surcharge.

The ACV (All Commodity Volume) analysis shows each individual commissary or complex FY84 sales total as a percentage of separately combined CONUS and overseas sales of all Army, Air Force, Marine Corps and Navy commissaries. Sales at commissaries in Alaska, Hawaii, Puerto Rico and other locations not contiguous with the 48 continental United States are classed and reported "Overseas." The ACV given for "Worldwide Totals" represents the percent sales share of commissaries operated by that service branch against the FY84 worldwide sales reported for *all* service branches.

## Air Force Commissary Store Rankings by ACV CONUS and Overseas . . . based on FY84 sales

The ACV (All Commodity Volume) rankings are provided as a sales and marketing management tool for companies who wish to identify marketing opportunities with accurate sales performance data. The ACV for each CONUS and overseas Air Force commissary is calculated by dividing the sales totals for *all* CONUS or overseas commissaries of *all* service branches into that individual store's sales total. The overseas ACV for Hickam AFB in Hawaii, for example, indicates that 3.27 percent of *all* overseas commissaries' sales, regardless of their service branch affiliation, were generated at Hickam. Excluded from all sales data in this *Interservice* report are FY84 sales at Coast Guard's two commissaries, one in CONUS (Governors Island, NY) and one overseas (Kodiak, AK), because official data is not available.

### CONUS

| Rank | Store | ACV |
|---|---|---|
| 1 | MacDill AFB, FL | 1.46 |
| 2 | McChord AFB, WA | 1.28 |
| 3 | McGuire AFB, NJ | 1.23 |
| 4 | Carswell AFB, TX | 1.18 |
| 5 | Wright-Patterson AFB, OH | 1.14 |
| 6 | Randolph AFB, TX | 1.05 |
| 7 | Andrews AFB, MD | 1.02 |
| 8 | Barksdale AFB, LA | 1.01 |
| 9 | Tinker AFB, OK | 1.00 |
| 10 | Langley AFB, TX | 1.00 |
| 11 | Lackland AFB, TX | 0.97 |
| 12 | Offutt AFB, NE | 0.94 |
| 13 | Nellis AFB, CA | 0.93 |
| 14 | Lowry AFB, CO | 0.93 |
| 15 | Patrick AFB, FL | 0.89 |
| 16 | Bergstrom AFB, TX | 0.89 |
| 17 | Mather AFB, CA | 0.89 |
| 18 | Travis AFB, CA | 0.85 |
| 19 | Eglin AFB, FL | 0.85 |
| 20 | Davis-Monthan AFB, AZ | 0.84 |
| 21 | Little Rock AFB, AK | 0.84 |
| 22 | Kirtland AFB, NM | 0.83 |
| 23 | Keesler AFB, MS | 0.83 |
| 24 | Luke AFB, AZ | 0.75 |
| 25 | Charleston AFB, SC | 0.74 |
| 26 | Homestead AFB, FL | 0.73 |
| 27 | Scott AFB, IL | 0.71 |
| 28 | Norton AFB, CA | 0.70 |
| 29 | Peterson AFB, CO | 0.70 |
| 30 | March AFB, CA | 0.68 |
| 31 | McClellan AFB, CA | 0.66 |
| 32 | Hill AFB, UT | 0.60 |
| 33 | Fairchild AFB, WA | 0.60 |
| 34 | Tyndall AFB, FL | 0.56 |
| 35 | Bolling AFB, DC | 0.54 |
| 36 | Hanscom AFB, MA | 0.54 |
| 37 | Pease AFB, NH | 0.53 |
| 38 | Sheppard AFB, TX | 0.51 |
| 39 | Robins AFB, GA | 0.51 |
| 40 | Maxwell AFB, AL | 0.51 |
| 41 | Castle AFB, CA | 0.50 |
| 42 | Dover AFB, DE | 0.50 |
| 43 | Vandenberg AFB, CA | 0.49 |
| 44 | Williams AFB, AZ | 0.45 |
| 45 | McConnell AFB, KS | 0.45 |
| 46 | USAF Academy, CO | 0.44 |
| 47 | Dyess AFB, TX | 0.43 |
| 48 | Seymour Johnson AFB, NC | 0.42 |
| 49 | Shaw AFB, SC | 0.42 |
| 50 | Griffiss AFB, NY | 0.39 |
| 51 | Beale AFB, CA | 0.38 |
| 52 | Chanute AFB, IN | 0.38 |
| 53 | England AFB, LA | 0.37 |
| 54 | George AFB, CA | 0.36 |
| 55 | Gunter AFS, AL | 0.36 |
| 56 | Ellsworth AFB, SD | 0.36 |
| 57 | Holloman AFB, NM | 0.34 |
| 58 | Edwards AFB, CA | 0.34 |
| 59 | Mt. Home AFB, ID | 0.33 |
| 60 | Hurlburt Field, FL | 0.33 |
| 61 | Malmstrom AFB, MT | 0.32 |
| 62 | Los Angeles AFS, CA | 0.31 |
| 63 | Moody AFB, GA | 0.30 |
| 64 | F.E. Warren AFB, WY | 0.30 |

continued on page 97

# Air Force Commissary Sales — FY84

## Analysis of Sales by Store and Complex (Overseas)

### Alaska Complex

| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| Eielson AFB, AK | 4 | $ 7,796,237 | 80 | 15 | 5 | +3.1 | 9,555 | 68 | 0.82 |
| Elmendorf AFB, AK | 8 | 27,940,488 | 75 | 20 | 5 | +0.6 | 31,465 | 74 | 2.94 |
| **Complex Totals** | | **$35,736,725** | **76** | **19** | **5** | **+1.1** | **41,020** | **$ 73** | **3.76** |

### Frankfurt Area Complex

| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| Hahn AB, FRG | 4 | $ 6,811,289 | 85 | 11 | 4 | +3.9 | 10,915 | 52 | 0.72 |
| Hessisch-Oldendorf, FRG | 1 | 1,073,412 | 95 | 0 | 5 | +4.4 | 3,580 | 25 | 0.11 |
| Rhein Main AB, FRG | 5 | 9,404,807 | 82 | 13 | 5 | −2.7 | 17,420 | 45 | 0.99 |
| **Complex Totals** | | **$17,289,508** | **84** | **11** | **5** | +0.2 | 31,915 | $ 45 | 1.82 |

### Greece Complex

| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| Hellenikon AB | 1 | $ 921,954 | 95 | 0 | 5 | +7.1 | 2,955 | 26 | 0.10 |
| Hellenikon Branch | 2 | 3,570,620 | 88 | 8 | 4 | −14.8 | 12,940 | 23 | 0.38 |
| Iraklion AS (Crete) | 2 | 1,681,910 | 85 | 9 | 6 | −0.1 | 4,835 | 29 | 0.18 |
| **Complex Totals** | | **$6,174,484** | **88** | 7 | 5 | −7.7 | **20,730** | **$ 25** | **0.65** |

### Kaiserslautern Area Complex

| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| Oslo, Norway | 1 | $ 748,036$ | 93 | 1 | 6 | −2.2 | 2,835 | 22 | 0.08 |
| Ramstein AB, FRG | 7 | 20,330,695 | 80 | 13 | 7 | +27.1 | 26,895 | 63 | 2.14 |
| Sembach AB, FRG | 3 | 4,465,287 | 81 | 14 | 5 | +1.7 | 9,305 | 40 | 0.47 |
| Vogelweh, FRG | 6 | 14,020,543 | 81 | 14 | 5 | −8.0 | 19,475 | 60 | 1.48 |
| **Complex Totals** | | **$39,564,561** | **81** | **13** | **6** | **+8.7** | **58,510** | **$ 56** | **4.16** |

**Notes:** Sales data in this special *Interservice* report exclude the 5 percent commissary surcharge.

Sales classifications for Air Force commissaries are based upon total average monthly sales, as follows:

| | | | |
|---|---|---|---|
| Class 1 Up to $100,000 | Class 3 $300,001-$500,000 | Class 5 $750,001-$1,000,000 | Class 7 $1,500,001-$2,000,000 |
| Class 2 $100,001-$300,000 | Class 4 $500,001-$750,000 | Class 6 $1,000,001-$1,500,000 | Class 8 Over $2,000,000 |

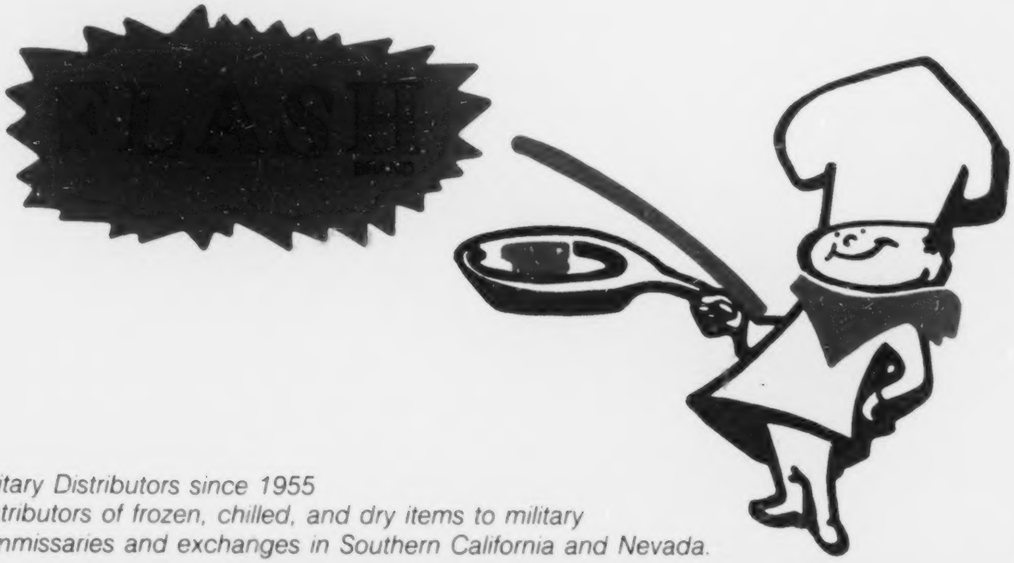
The ACV (All Commodity Volume) analysis shows each individual commissary or complex FY84 sales total as a percentage of separately combined CONUS and overseas sales of all Army, Air Force, Marine Corps and Navy commissaries. Sales at commissaries in Alaska, Hawaii, Puerto Rico and other locations not contiguous with the 48 continental United States are classed and reported "Overseas." The ACV given for "Worldwide Totals" represents the percent sales share of commissaries operated by that service branch against the FY84 worldwide sales reported for *all* service branches.

continued from page 94

| | | |
|---|---|---|
| 65 | Myrtle Beach AFB, SC | 0.29 |
| 66 | Columbus AFB, MS | 0.29 |
| 67 | Whiteman AFB, MO | 0.28 |
| 68 | Plattsburgh AFB, NY | 0.28 |
| 69 | Kelly AFB, TX | 0.28 |
| 70 | Grand Forks AFB, ND | 0.26 |
| 71 | Altus AFB, OK | 0.26 |
| 72 | Minot AFB, ND | 0.25 |
| 73 | K.I. Sawyer AFB, ND | 0.25 |
| 74 | Grissom AFB, IN | 0.24 |
| 75 | Blytheville AFB, AR | 0.24 |
| 76 | Cannon AFB, NM | 0.24 |
| 77 | Goodfellow AFB, TX | 0.22 |
| 78 | Wurtsmith AFB, MI | 0.22 |
| 79 | Reese AFB, TX | 0.21 |
| 80 | Loring AFB, ME | 0.21 |
| 81 | Brooks AFB, TX | 0.19 |
| 82 | Laughlin AFB, TX | 0.15 |
| 83 | Vance AFB, OK | 0.14 |
| 84 | Arnold AFS, TN | 0.11 |
| 85 | Fort Fisher AFS, NC | 0.02 |
| 86 | North Truro AFS, MA | 0.02 |
| 87 | Indian Springs Fld., NV | 0.01 |
| 88 | Calumet AFS, MI | 0.01 |
| 89 | Gila Bend AF Aux. Fld, AZ | 0.01 |
| 90 | Port Austin AFS, MI | 0.01 |
| 91 | Makah AFS, WA | 0.01 |
| 92 | Avon Park Range, FL | 0.01 |
| 93 | Holbrook RBS, AZ | -0- |

## Overseas

| Rank | Store | ACV |
|---|---|---|
| 1 | Hickam AFB, HI | 3.27 |
| 2 | Elmendorf AFB, AK | 2.94 |
| 3 | Clark AB, Philippines | 2.87 |
| 4 | Kadena AB, Japan | 2.20 |
| 5 | Ramstein AB, FRG | 2.14 |
| 6 | Osan AB, Korea | 2.02 |
| 7 | Andersen AFB, Guam | 1.55 |
| 8 | Vogelweh, FRG | 1.48 |
| 9 | RAF Lakenheath, UK | 1.46 |
| 10 | Yokota AB, Japan | 1.41 |
| 11 | Camp Butler, Japan | 1.19 |
| 12 | Rhein Main AB, FRG | 0.99 |
| 13 | RAF Upper Heyford, UK | 0.94 |
| 14 | RAF Bentwaters, UK | 0.84 |
| 15 | Torrejon AB, Spain | 0.83 |
| 16 | Eielson AFB, AK | 0.82 |
| 17 | Bitburg AB, FRG | 0.79 |
| 18 | Misawa AB, Japan | 0.73 |
| 19 | Hahn AB, FRG | 0.72 |
| 20 | RAF Alconbury, UK | 0.60 |
| 21 | Spangdahlem AB, FRG | 0.51 |
| 22 | Sembach AB, FRG | 0.47 |
| 23 | Camp Kinser, Japan | 0.45 |
| 24 | Lajes Field, Azores | 0.44 |
| 25 | Incirlik CDI, Turkey | 0.42 |
| 26 | Hellenikon Branch, Greece | 0.38 |
| 27 | Makiminato, Japan | 0.37 |
| 28 | Aviano AB, Italy | 0.35 |
| 29 | Camp New Amsterdam, NL | 0.35 |
| 30 | RAF Greenham Common, UK | 0.28 |
| 31 | San Vito AS, Italy | 0.27 |
| 32 | RAF Fairford, UK | 0.26 |
| 33 | RAF Chicksands, UK | 0.25 |
| 34 | Zaragoza AB, Spain | 0.23 |
| 35 | Izmir, Turkey | 0.21 |
| 36 | Iraklion AS (Crete) | 0.18 |
| 37 | Ankara, Turkey | 0.18 |
| 38 | Hessisch-Oldendorf, FRG | 0.11 |
| 39 | RAF Wethersfield, UK | 0.10 |
| 40 | Hellenikon AB, Greece | 0.10 |
| 41 | Oslo, Norway | 0.08 |
| 42 | Royal Oaks HA, Spain | 0.06 |
| 43 | Preum AS, FRG | 0.04 |
| 44 | RAF Sculthorpe, UK | 0.04 |
| 45 | Trier HA, Spain | 0.01 |



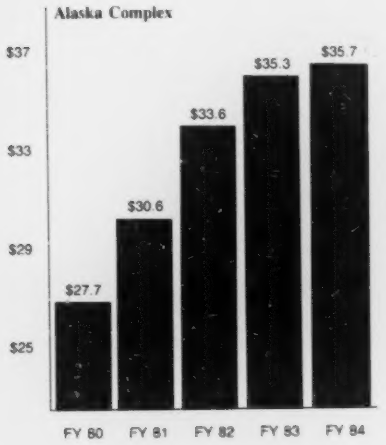
*Military Distributors since 1955*
*Distributors of frozen, chilled, and dry items to military commissaries and exchanges in Southern California and Nevada.*

**FLASH STEAK COMPANY, INC.**

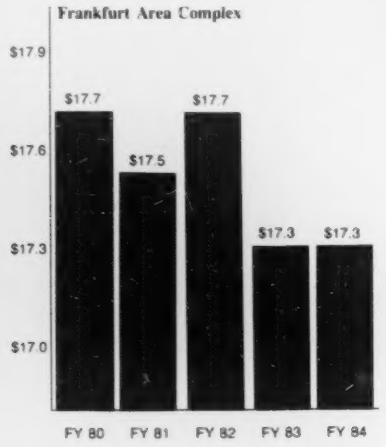
*7959 Paramount Boulevard, Pico Rivera, CA 90660 (213) 949-2558 Contact: Chris M. Sanchez (15)*

# Air Force Commissary Sales — FY84

**5-Year Total Sales Summary – (AFCOMS)/$ Millions**



**5-Year Total Sales Summary – (AFCOMS)/$ Millions**

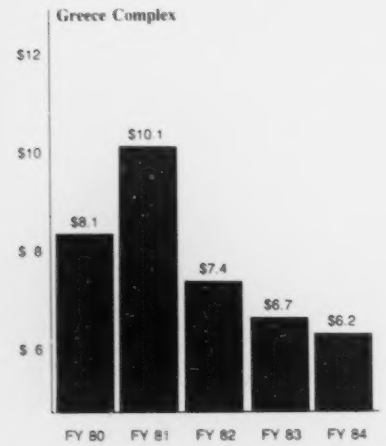


## It's A Fact!

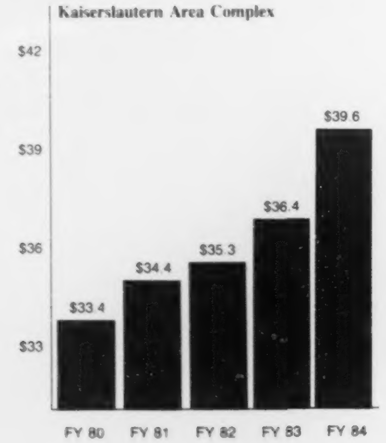
Do you know which are the top ten *CONUS* commissaries with the largest, single store (i.e., *excluding* annexes) square feet of sales area?

1. Wright-Patterson AFB, OH (*40,565*)
2. McGuire AFB, NJ (*40,510*)
3. Miramar, CA (*38,600*)
4. Cameron Station, VA (*37,852*)
5. Little Creek, VA (*35,912*)
6. McChord AFB, WA (*34,245*)
7. Randolph AFB, TX (*33,445*)
8. Offutt AFB, NE (*33,330*)
9. Ft. Benning, GA (*32,729*)
10. San Diego NS, CA (*32,590*)

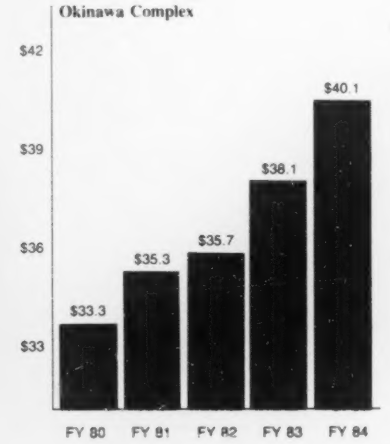
**5-Year Total Sales Summary – (AFCOMS)/$ Millions**



**5-Year Total Sales Summary – (AFCOMS)/$ Millions**



**5-Year Total Sales Summary – (AFCOMS)/$ Millions**



## Okinawa Complex

| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| Butler | 5 | $11,334,881 | 81 | 14 | 5 | +1.4 | 15,745 | 60 | 1.19 |
| Kadena AB | 7 | 20,951,853 | 79 | 15 | 5 | −0.4 | 28,625 | 61 | 2.20 |
| Kinser | 3 | 4,273,931 | 100 | 0 | 0 | +78.5 | 0 | 0 | 0.45 |
| Makiminato | 2 | 3,526,933 | 81 | 14 | 5 | +1.1 | 8,645 | 34 | 0.37 |
| **Complex Totals** | | **$40,087,598** | **82** | **13** | **5** | **+5.2** | **53,015** | **$ 56** | **4.22** |

**Notes:** Sales data in this special *Interservice* report exclude the 5 percent commissary surcharge.

The ACV (All Commodity Volume) analysis shows each individual commissary or complex FY84 sales total as a percentage of separately combined CONUS and overseas sales of all Army, Air Force, Marine Corps and Navy commissaries. Sales at commissaries in Alaska, Hawaii, Puerto Rico and other locations not contiguous with the 48 continental United States are classed and reported "Overseas." The ACV given for "Worldwide Totals" represents the percent sales share of commissaries operated by that service branch against the FY84 worldwide sales reported for *all* service branches.

# Air Force Commissary Sales — FY84

## Spain Complex

| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| Royal Oaks HA | 1 | $ 595,575 | 95 | 1 | 4 | −10.2 | 6,205 | 8 | 0.06 |
| Torrejon AB | 4 | 7,862,374 | 87 | 10 | 3 | −4.8 | 19,855 | 33 | 0.83 |
| Zaragoza AB | 2 | 2,225,823 | 88 | 8 | 4 | +17.7 | 6,185 | 30 | 0.23 |
| **Complex Totals** | | **$10,683,772** | **88** | **9** | **3** | **−1.2** | **32,245** | **$ 28** | **1.12** |

## Trier Area Complex

| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| Bitburg AB, FRG | 4 | $ 7,530,228 | 82 | 12 | 6 | +1.3 | 14,940 | 42 | 0.79 |
| Preum AS, FRG | 1 | 415,560 | 94 | 2 | 4 | +5.2 | 4,330 | 8 | 0.04 |
| Spangdahlem AB, FRG | 3 | 4,878,824 | 83 | 12 | 5 | +4.9 | 8,650 | 47 | 0.51 |
| Trier HA, FRG | 1 | 126,895 | 95 | 2 | 3 | +3.5 | 3,525 | 3 | 0.01 |
| **Complex Totals** | | **$12,951,507** | **83** | **12** | **5** | +2.8 | 31,445 | $ 34 | 1.36 |

## United Kingdom Complex

| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| RAF Alconbury | 3 | $ 5,717,535 | 76 | 18 | 6 | +16.4 | 11,080 | 43 | 0.60 |
| RAF Bentwaters | 4 | 7,978,069 | 78 | 16 | 6 | +4.0 | 20,150 | 33 | 0.84 |
| RAF Chicksands | 2 | 2,370,769 | 81 | 14 | 5 | −3.7 | 5,065 | 39 | 0.25 |
| RAF Fairford | 2 | 2,449,712 | 77 | 18 | 5 | +9.6 | 6,435 | 36 | 0.26 |
| RAF Greenham Common | 2 | 2,676,334 | 79 | 16 | 5 | +55.1 | 7,690 | 29 | 0.28 |
| RAF Lakenheath | 6 | 13,916,548 | 80 | 15 | 5 | −0.2 | 14,870 | 78 | 1.46 |
| RAF Sculthorpe | 1 | 391,509 | 100 | 0 | 0 | +14.8 | 2,720 | 12 | 0.04 |
| RAF Upper Heyford | 4 | 8,903,517 | 78 | 18 | 4 | +5.9 | 13,250 | 56 | 0.94 |
| RAF Wethersfield | 1 | 971,355 | 76 | 18 | 6 | −6.9 | 4,760 | 17 | 0.10 |
| **Complex Totals** | | **$45,375,348** | **79** | **16** | **5** | **+6.2** | **86,020** | **$ 44** | **4.77** |

**Notes:** Sales data in this special *Interservice* report exclude the 5 percent commissary surcharge.

The ACV (All Commodity Volume) analysis shows each individual commissary or complex FY84 sales total as a percentage of separately combined CONUS and overseas sales of all Army, Air Force, Marine Corps and Navy commissaries. Sales at commissaries in Alaska, Hawaii, Puerto Rico and other locations not contiguous with the 48 continental United States are classed and reported "Overseas." The ACV given for "Worldwide Totals" represents the percent sales share of commissaries operated by that service branch against the FY84 worldwide sales reported for *all* service branches.

## It's A Fact!

Do you know which worldwide military commissary last year posted the highest figure for average monthly sales per square foot of selling space? The Army's commissary in Wiesbaden, West Germany reported a whopping $639.

# Air Force Commissary Sales — FY84

## Non-Complex Stores Overseas

| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| Andersen AFB, Guam | 6 | $ 14,694,103 | 79 | 15 | 6 | −12.0 | 17,010 | 72 | 1.55 |
| Ankara, Turkey | 2 | 1,678,989 | 88 | 8 | 4 | −2.4 | 12,720 | 11 | 0.18 |
| Aviano AB, Italy | 2 | 3,345,411 | 83 | 10 | 7 | +3.2 | 7,965 | 35 | 0.35 |
| Camp New Amsterdam, Netherlands | 2 | 3,321,613 | 82 | 13 | 5 | +11.0 | 9,890 | 28 | 0.35 |
| Clark AB, Philippines | 8 | 27,275,117 | 81 | 13 | 6 | −2.2 | 27,720 | 82 | 2.87 |
| Hickam AFB, HI | 8 | 31,089,234 | 76 | 18 | 5 | −8.3 | 22,530 | 115 | 3.27 |
| Incirlik, Turkey | 3 | 4,005,472 | 86 | 9 | 5 | +11.7 | 8,560 | 39 | 0.42 |
| Izmir, Turkey | 2 | 1,975,337 | 89 | 8 | 3 | +5.8 | 5,880 | 28 | 0.21 |
| Lajes Field, Azores | 3 | 4,189,709 | 87 | 8 | 5 | +9.0 | 7,935 | 44 | 0.44 |
| Misawa AB, Japan | 4 | 6,947,846 | 79 | 15 | 6 | +6.6 | 9,190 | 63 | 0.73 |
| Osan AB, Korea | 7 | 19,154,950 | 79 | 17 | 4 | +0.4 | 23,475 | 68 | 2.02 |
| San Vito AS, Italy | 2 | 2,538,474 | 86 | 9 | 5 | +8.9 | 7,295 | 29 | 0.27 |
| Yokota AB, Japan | 4 | 13,398,359 | 79 | 17 | 4 | +4.9 | 20,300 | 55 | 1.41 |
| **Non-Complex Stores' Totals** | | **$133,614,614** | **N.A.** | **N.A.** | **N.A.** | **N.A.** | **180,470** | **$ 62** | **14.06** |

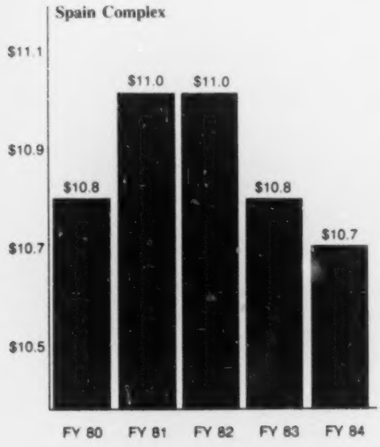
## Totals

| | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|
| | | Grocery | Meat | Produce | | | | |
| **Overseas Totals** | **$341,478,117** | **80%** | **15%** | **5%** | **+1.5%** | **535,370** | **$ 53** | **35.93%** |
| **Worldwide Totals** | **$2,060,232,018** | **78%** | **17%** | **5%** | **+2.1%** | **3,301,321** | **$ 52** | **45.03%** |

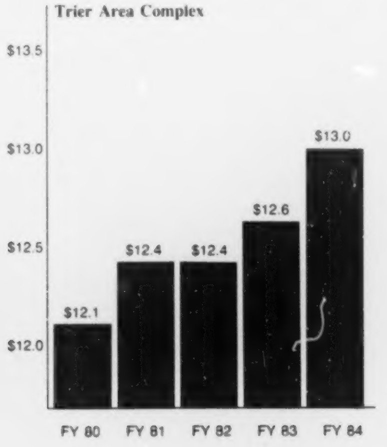
**Notes:** Sales data in this special *Interservice* report exclude the 5 percent commissary surcharge.

The ACV (All Commodity Volume) analysis shows each individual commissary or complex FY84 sales total as a percentage of separately combined CONUS and overseas sales of all Army, Air Force, Marine Corps and Navy commissaries. Sales at commissaries in Alaska, Hawaii, Puerto Rico and other locations not contiguous with the 48 continental United States are classed and reported "Overseas." The ACV given for "Worldwide Totals" represents the percent sales share of commissaries operated by that service branch against the FY84 worldwide sales reported for *all* service branches.

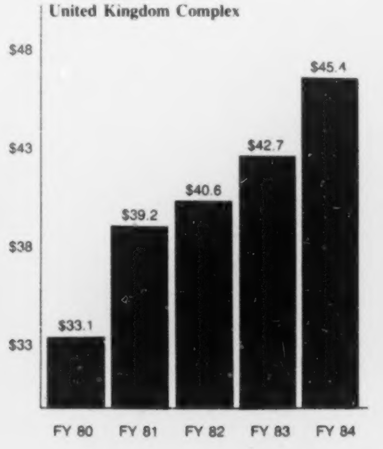
**5-Year Total Sales Summary—(AFCOMS)/$ Millions**



**5-Year Total Sales Summary—(AFCOMS)/$ Millions**



**5-Year Total Sales Summary—(AFCOMS)/$ Millions**



# Air Force Commissary Sales — FY84

## Air Force Commissary Store Rankings by Average Monthly $ Sales/Square Foot . . . based on FY84 sales

*Overseas stores are in italics.*
N.A. = Not available.

| Rank | Store | Avg. Mo. $ Sales/ Sq. Ft. |
|---|---|---|
| 1 | MacDill AFB, FL | 164 |
| 2 | Carswell AFB, TX | 155 |
| *3* | *Hickam AFB, HI* | *115* |
| 4 | McChord AFB, WA | 113 |
| 5 | Langley AFB, VA | 110 |
| 6 | Lowry AFB, CO | 107 |
| 7 | Bergstrom AFB, TX | 106 |
| 8 | Eglin AFB, FL | 104 |
| 9 | Andrews AFB, MD | 103 |
| 10 | Barksdale AFB, LA | 102 |
| 11 | Tinker AFB, OK | 102 |
| 12 | Lackland AFB, TX | 101 |
| 13 | Nellis AFB, NV | 101 |
| 14 | Homestead AFB, FL | 98 |
| 15 | Travis AFB, CA | 96 |
| 16 | Davis-Monthan AFB, AZ | 95 |
| 17 | Randolph, AFB, TX | 95 |
| 18 | Fairchild AFB, WA | 93 |
| 19 | Kirtland AFB, NM | 93 |
| 20 | McClellan AFB, CA | 93 |
| 21 | March AFB, CA | 92 |
| 22 | McGuire AFB, CA | 92 |
| 23 | Patrick AFB, FL | 92 |
| 24 | Peterson AFB, CO | 92 |
| 25 | Mather AFB, CA | 88 |
| 26 | Beale AFB, CA | 87 |
| 27 | Hurlburt Field, FL | 86 |
| 28 | Little Rock AFB, AR | 86 |
| 29 | Norton AFB, CA | 86 |
| 30 | Luke AFB, AZ | 85 |
| 31 | Offutt AFB, NE | 85 |
| 32 | Wright-Patterson AFB, OH | 85 |
| 33 | Charleston AFB, SC | 84 |
| 34 | Shaw AFB, SC | 84 |
| *35* | *Clark AB, Philippines* | *82* |
| 36 | England AFB, LA | 82 |
| 37 | Dyess AFB, TX | 81 |
| 38 | Keesler AFB, MS | 81 |
| 39 | USAF Academy, CO | 81 |
| 40 | Scott AFB, IL | 79 |
| *41* | *RAF Lakenheath, UK* | *78* |
| 42 | Myrtle Beach AFB, SC | 78 |
| 43 | George AFB, CA | 77 |
| 44 | Griffiss AFB, NY | 76 |
| *45* | *Elmendorf AFB, AK* | *74* |
| 46 | Hill AFB, UT | 74 |
| 47 | Seymour Johnson AFB, NC | 74 |
| 48 | Altus AFB, OK | 73 |
| 49 | Maxwell AFB, AL | 73 |
| *50* | *Andersen AFB, Guam* | *72* |
| *51* | *Eielson AFB, AK* | *68* |
| *52* | *Osan AB, Korea* | *68* |
| 53 | Bolling AFB, DC | 67 |
| 54 | Blytheville AFB, AR | 66 |
| 55 | Castle AFB, CA | 65 |
| 56 | Gunter AFS, AL | 65 |
| 57 | Mt. Home AFB, ID | 65 |
| *58* | *Misawa, Japan* | *63* |
| 59 | Pease AFB, NH | 63 |
| *60* | *Ramstein AB, FRG* | *63* |
| 61 | F.E. Warren AFB, WY | 63 |
| 62 | Brooks AFB, TX | 61 |
| *63* | *Kadena AB, Japan* | *61* |
| 64 | Ellsworth AFB, SD | 61 |
| *65* | *Butler, Japan* | *60* |
| 66 | Vandenberg AFB, CA | 60 |
| *67* | *Vogelweh, FRG* | *60* |
| 68 | Dover AFB, DE | 59 |
| 69 | Williams AFB, AZ | 59 |
| 70 | Tyndall AFB, FL | 58 |
| 71 | Minot AFB, ND | 57 |
| 72 | Robins AFB, GA | 57 |
| 73 | Goodfellow AFB, TX | 56 |
| 74 | Malmstrom AFB, MT | 56 |
| *75* | *RAF Upper Heyford, UK* | *56* |
| *76* | *Yokota AB, Japan* | *55* |
| 77 | Kelly AFB, TX | 54 |
| 78 | McConnell AFB, KS | 54 |
| *79* | *Hahn AB, FRG* | *52* |
| 80 | Hanscom AFB, MA | 50 |
| 81 | Loring AFB, ME | 50 |
| 82 | Sheppard AFB, TX | 50 |
| 83 | Columbus AFB, MS | 51 |
| 84 | Moody AFB, GA | 51 |
| 85 | Edwards AFB, CA | 48 |
| 86 | Grand Forks AFB, ND | 48 |
| *87* | *Spangdahlem AB, FRG* | *47* |
| 88 | Whiteman AFB, MO | 46 |
| *89* | *Rhein-Main AB, FRG* | *45* |
| 90 | Chanute AFB, IL | 44 |
| *91* | *Lajes Field, Azores* | *44* |
| 92 | Holloman AFB, NM | 43 |
| 93 | Plattsburgh AFB, NY | 43 |
| *94* | *RAF Alconbury, UK* | *43* |
| 95 | Vance AFB, OK | 43 |
| *96* | *Bitburg AB, FRG* | *42* |
| 97 | K.I. Sawyer AFB, ND | 42 |
| 98 | Arnold AFS, TN | 40 |
| *99* | *Sembach AB, FRG* | *40* |
| *100* | *Incirlik CDI, Turkey* | *39* |
| *101* | *RAF Chicksands, UK* | *39* |
| 102 | Reese AFB, TX | 39 |
| 103 | Wurtsmith AFB, MI | 39 |
| 104 | Cannon AFB, NM | 38 |
| 105 | Grissom AFB, IN | 37 |
| *106* | *RAF Fairford, UK* | *36* |
| *107* | *Aviano AB, Italy* | *35* |
| 108 | Laughlin AFB, TX | 35 |
| 109 | Los Angeles AFS, CA | 34 |
| *110* | *Makiminato, Japan* | *34* |
| *111* | *RAF Bentwaters, UK* | *33* |
| *112* | *Torrejon AB, Spain* | *33* |
| *113* | *Zaragoza, Spain* | *30* |
| *114* | *Iraklion AS, Greece* | *29* |
| *115* | *RAF Greenham Common, UK* | *29* |
| *116* | *San Vito AS, Italy* | *29* |
| *117* | *Camp New Amsterdam, NL* | *28* |
| *118* | *Izmir, Turkey* | *28* |
| *119* | *Hellenikon AB, Greece* | *26* |
| 120 | Avon Park Range, FL | 25 |
| *121* | *Hessisch-Oldendorf, FRG* | *25* |
| 122 | Holbrook RBS, AZ | 24 |
| *123* | *Hellenikon Branch, Greece* | *23* |
| 124 | Indian Springs Fld., NV | 22 |
| *125* | *Oslo, Norway* | *22* |
| 126 | Fort Fisher AFS, NC | 20 |
| 127 | North Truro AFS, MA | 20 |
| *128* | *RAF Wethersfield, UK* | *17* |
| 129 | Calumet AFS, MI | 17 |
| 130 | Port Austin AFS, MI | 16 |
| 131 | Makah AFS, WA | 15 |
| *132* | *RAF Sculthorpe, UK* | *12* |
| *133* | *Ankara, Turkey* | *11* |
| 134 | Gila Bend AF Aux. Fld., AZ | 10 |
| *135* | *Preum AS, FRG* | *8* |
| *136* | *Royal Oaks HA, Spain* | *8* |
| *137* | *Trier HA, FRG* | *3* |
| *138* | *Camp Kinser, Japan* | *N.A.* |

## It's A Fact!

The sales performance of Navy commissaries has been truly remarkable. Did you know that *every* Navy CONUS region/group/division last year reported at least a 6 percent sales gain over FY83? In fact, all but two regional store groupings reported FY84 sales increases of 10 percent or more!

# Army Commissary Sales — FY84

## Analysis of Sales by Store and Region (Continental United States)

### Midwest Region

| Store | Store Class | Total Store $ Sales | % of Store Total Grocery | Meat | Produce | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| Ft. Ben Harrison, IN | 6 | $ 15,663,568 | 76 | 19 | 5 | −2.7 | 16,196 | 81 | 0.43 |
| Ft. Bliss, TX | 8 | 50,506,919 | 76 | 19 | 5 | +0.8 | *32,538* | 129 | 1.39 |
| Ft. Carson, CO | 8 | 32,624,336 | 76 | 20 | 4 | +5.2 | 21,864 | 124 | 0.90 |
| Fitzsimons AMC, CO | 6 | 12,778,712 | 79 | 17 | 4 | +3.0 | 8,712 | 122 | 0.35 |
| Granite City AD, IL | 6 | 15,579,528 | 78 | 18 | 4 | +1.4 | 20,789 | 62 | 0.43 |
| Ft. Hood, TX | 8 | 51,849,780 | 76 | 20 | 4 | +4.4 | *35,929* | 120 | 1.43 |
| Ft. Leavenworth, KS | 7 | 19,012,829 | 79 | 17 | 4 | +10.6 | 23,076 | 69 | 0.52 |
| Ft. Leonard Wood, MO | 7 | 18,580,810 | 79 | 16 | 5 | +2.7 | 18,512 | 84 | 0.51 |
| Ft. Polk, LA | 7 | 21,378,652 | 76 | 20 | 4 | +3.5 | 19,642 | 91 | 0.59 |
| Ft. Riley, KS | 7 | 19,423,190 | 78 | 18 | 4 | −2.0 | 23,500 | 69 | 0.54 |
| Rock Island, IL | 3 | 4,045,720 | 81 | 17 | 2 | −6.3 | 6,944 | 49 | 0.11 |
| Ft. Sam Houston, TX | 8 | 32,430,800 | 76 | 20 | 4 | +1.3 | 26,904 | 100 | 0.89 |
| Selfridge ANG, MI | 5 | 11,449,480 | 81 | 16 | 3 | −4.3 | 9,687 | 98 | 0.32 |
| Ft. Sheridan, IL | 4 | 7,727,740 | 84 | 13 | 3 | −6.3 | 8,418 | 77 | 0.21 |
| Ft. Sill, OK | 8 | 31,428,935 | 76 | 20 | 4 | +3.4 | 31,757 | 82 | 0.87 |
| White Sands, NM | 3 | 3,694,876 | 76 | 20 | 4 | −0.9 | 6,768 | 45 | 0.10 |
| **Region Totals** | | **$348,175,875** | **77** | **19** | **4** | **+2.1** | **311,236** | **$ 93** | **9.60** |

Main stores with total sq. ft. sales area in italics indicates that the sales area for one or more grocery annexes at that location are included in the main store's sales area total. Sales at annexes also are included in the main store's sales total.

**Notes:** Sales data in this special *Interservice* report exclude the 5 percent commissary surcharge.

Sales classifications for Army commissaries are based upon total average monthly sales, as follows:
Class 1 Up to $100,000
Class 2 $100,001-$300,000
Class 3 $300,001-$500,000
Class 4 $500,001-$750,000
Class 5 $750,001-$1,000,000
Class 6 $1,000,001-$1,500,000
Class 7 $1,500,001-$2,000,000
Class 8 Over $2,000,000

The ACV (All Commodity Volume) analysis shows each individual commissary or region FY84 sales total as a percentage of separately combined CONUS and overseas sales of all Army, Air Force, Marine Corps and Navy commissaries. Sales at commissaries in Alaska, Hawaii, Puerto Rico and other locations not contiguous with the 48 continental United States are classed and reported "Overseas." The ACV given for "Worldwide Totals" represents the percent sales share of commissaries operated by that service branch against the FY84 worldwide sales reported for *all* service branches.

# Army Commissary Coupon Redemptions — FY84

## CONUS

| Region | Number | % Share CONUS | % Share Worldwide | $ Value | % Share CONUS | % Share Worldwide |
|---|---|---|---|---|---|---|
| Midwest | 11,700,000 | 28.0 | 26.9 | 2,952,558 | 28.2 | 27.4 |
| Northeast | 12,400,000 | 29.7 | 28.5 | 3,011,193 | 28.7 | 27.8 |
| Southeast | 13,000,000 | 31.1 | 29.9 | 3,333,905 | 31.8 | 30.8 |
| Western | 4,700,000 | 11.2 | 10.8 | 1,188,401 | 11.3 | 10.9 |
| **CONUS Totals** | **41,800,000** | **100.0%** | **96.1%** | **$10,486,057** | **100.0%** | **96.9%** |

## Overseas

| Region | Number | % Share Overseas | % Share Worldwide | $ Value | % Share Overseas | % Share Worldwide |
|---|---|---|---|---|---|---|
| Europe | 1,700,000 | 100.0 | 3.9 | 331,071 | 100.0 | 3.1 |
| **Overseas Totals** | **1,700,000** | **100.0%** | **3.9%** | **$331,071** | **100.0%** | **3.1%** |
| **Worldwide Totals** | **43,500,000** | | **100.0%** | **$10,817,128** | | **100.0%** |

**Note:** Data reported for Army commissaries do not reflect actual geographic distribution of coupon redemptions since official figures are reported by commissary region, with many stores in certain regions actually operating overseas but reported in CONUS data, and vice-versa.

# Army Commissary Sales — FY84

## Northeast Region

| Store | Store Class | Total Store $ Sales | % of Store Total: Grocery | % of Store Total: Meat | % of Store Total: Produce | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| Aberdeen Prov. Grnds., MD | 5 | $11,757,351 | 79 | 17 | 4 | +3.2 | 14,229 | 69 | 0.32 |
| ARDC, NJ | 2 | 2,469,032 | 82 | 14 | 4 | +15.0 | 6,400 | 32 | 0.07 |
| Ft. Belvoir, VA | 8 | 48,146,710 | 75 | 20 | 5 | +8.2 | 26,385 | 152 | 1.33 |
| Cameron Station, VA | 8 | 30,699,662 | 77 | 17 | 6 | +8.2 | 37,852 | 68 | 0.85 |
| Carlisle Barracks, PA | 5 | 9,959,745 | 79 | 16 | 5 | +4.0 | 11,312 | 73 | 0.27 |
| Ft. Devens, MA | 6 | 16,607,180 | 80 | 16 | 4 | −4.2 | 14,705 | 94 | 0.46 |
| Ft. Drum, NY | 3 | 4,398,368 | 79 | 17 | 4 | +14.1 | 10,600 | 35 | 0.12 |
| Edgewood Arsenal, MD | 4 | 6,152,181 | 80 | 16 | 4 | +3.4 | 11,658 | 44 | 0.17 |
| Ft. Hamilton, NY | 5 | 10,311,615 | 82 | 14 | 4 | +15.1 | 13,300 | 65 | 0.28 |
| Ft. McNair, DC | 4 | 7,052,018 | 77 | 18 | 5 | −2.4 | 12,573 | 47 | 0.19 |
| Ft. Meade, MD | 8 | 30,092,302 | 78 | 18 | 4 | +3.4 | *27,178* | 92 | 0.83 |
| Ft. Monmouth, NJ | 7 | 18,140,432 | 79 | 16 | 5 | −1.4 | 24,064 | 63 | 0.50 |
| Ft. Myer, VA | 7 | 21,138,174 | 77 | 19 | 4 | +1.2 | 19,056 | 92 | 0.58 |
| New Cumberland, PA | 4 | 6,355,589 | 85 | 12 | 3 | +1.1 | 16,798 | 32 | 0.18 |
| Oakdale ASC, PA | 4 | 8,716,360 | 81 | 16 | 3 | −3.7 | 6,000 | 121 | 0.24 |
| Ft. Ritchie, MD | 4 | 6,990,129 | 78 | 18 | 4 | +2.2 | 5,500 | 106 | 0.19 |
| Seneca AD, NY | 2 | 2,488,154 | 80 | 17 | 3 | +3.7 | 3,866 | 54 | 0.07 |
| Stewart AB, NY | 3 | 4,148,570 | 77 | 18 | 5 | +2.8 | 5,900 | 59 | 0.11 |
| Tobyhanna AD, PA | 3 | 5,685,391 | 84 | 13 | 3 | −1.9 | 9,000 | 53 | 0.16 |
| Vint Hill Farms, VA | 4 | 7,883,519 | 75 | 21 | 4 | +0.4 | 8,088 | 81 | 0.22 |
| Walter Reed AMC, DC | 8 | 25,193,731 | 77 | 19 | 4 | +3.4 | 25,000 | 84 | 0.70 |
| West Point, NY | 4 | 8,818,718 | 74 | 20 | 6 | −1.4 | 5,290 | 139 | 0.24 |
| **Region Totals** | | **$293,204,931** | **78** | **18** | **4** | **+3.5** | **314,754** | **$ 78** | **8.09** |

Main stores with total sq. ft. sales area in italics indicates that the sales area for one or more grocery annexes at that location are included in the main store's sales area total. Sales at annexes also are included in the main store's sales total.

**Notes:** Sales data in this special *Interservice* report exclude the 5 percent commissary surcharge.

The ACV (All Commodity Volume) analysis shows each individual commissary or region FY84 sales total as a percentage of separately combined CONUS and overseas sales of all Army, Air Force, Marine Corps and Navy commissaries. Sales at commissaries in Alaska, Hawaii, Puerto Rico and other locations not contiguous with the 48 continental United States are classed and reported "Overseas." The ACV given for "Worldwide Totals" represents the percent sales share of commissaries operated by that service branch against the FY84 worldwide sales reported for *all* service branches.

## Army Commissary Region Rankings by ACV CONUS and Overseas. . .based on FY84 sales

### CONUS

| Rank | Region | ACV |
|---|---|---|
| 1 | Southeast | 10.13 |
| 2 | Midwest | 9.60 |
| 3 | Northeast | 8.09 |
| 4 | Western | 3.57 |
| **Total Army CONUS ACV** | | **31.39** |

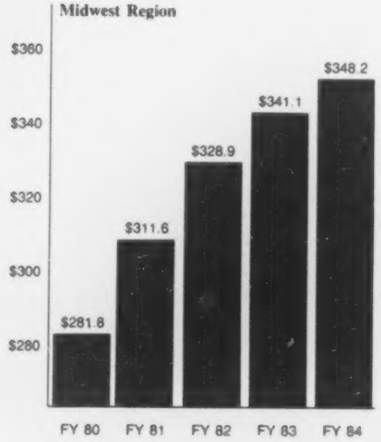
### Overseas

| Rank | Region | ACV |
|---|---|---|
| 1 | European | 30.27 |
| 2 | Western (Overseas) | 11.09 |
| 3 | Midwest (Panama) | 3.59 |
| 4 | Southeast (Puerto Rico) | 2.62 |
| **Total Army Overseas ACV** | | **47.57** |

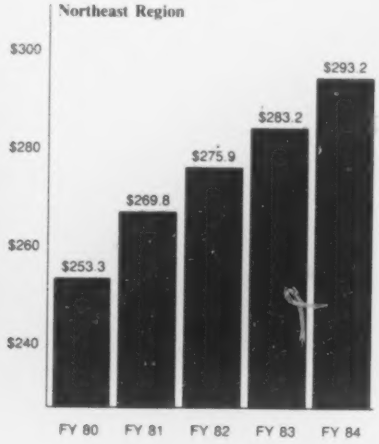
**Note:** Totals may not add due to rounding.

# Army Commissary Sales — FY84

5-Year Total Sales Summary – (TSA)/$ Millions



5-Year Total Sales Summary – (TSA)/$ Millions



## It's A Fact!

Can you name the ten *overseas* military commissaries that last year reported the highest average monthly dollar sales per square foot of selling space?

1. Wiesbaden, FRG (*$639*)
2. Vicenza, Italy (*$165*)
3. Pearl Harbor, HI (*$164*)
4. Hickam AFB, HI (*$115*)
5. Subic Bay, Philippines (*$112*)
6. Corozal, Panama (*$110*)
7. Mannheim, FRG (*$109*)
8. Mainz, FRG (*$107*)
9. Taegu, Korea (*$104*)
10. Pusan, Korea (*$103*)

## Southeast Region

| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| Ft. Benning, GA | 8 | $ 38,282,191 | 77 | 19 | 4 | +0.2 | 32,543 | 98 | 1.06 |
| Ft. Bragg, NC | 8 | 51,356,606 | 76 | 20 | 4 | +0.8 | *41,782* | 102 | 1.42 |
| Ft. Campbell, KY | 8 | 33,271,888 | 75 | 21 | 4 | +1.6 | 25,636 | 108 | 0.92 |
| Ft. Eustis, VA | 7 | 19,312,757 | 78 | 18 | 4 | +8.9 | *24,620* | 65 | 0.53 |
| Ft. Gillem, GA | 7 | 22,234,867 | 78 | 19 | 3 | +5.8 | 22,072 | 84 | 0.61 |
| Ft. Gordon, GA | 8 | 26,132,616 | 75 | 20 | 5 | +2.1 | 22,184 | 84 | 0.72 |
| Hunter AAF, GA | 5 | 10,778,428 | 76 | 20 | 4 | +1.1 | 17,500 | 51 | 0.30 |
| Ft. Jackson, SC | 7 | 22,479,175 | 77 | 18 | 5 | +2.0 | 10,280 | 182 | 0.62 |
| Ft. Knox, KY | 8 | 31,181,101 | 76 | 20 | 4 | +1.1 | 36,192 | 72 | 0.86 |
| Ft. Lee, VA | 7 | 19,189,223 | 76 | 19 | 5 | +0.2 | 25,216 | 63 | 0.53 |
| Lexington, KY | 3 | 3,080,032 | 84 | 13 | 3 | −4.7 | 3,300 | 78 | 0.08 |
| Ft. McClellan, AL | 6 | 16,269,977 | 78 | 18 | 4 | +1.6 | 15,286 | 86 | 0.45 |
| Ft. McPherson, GA | 3 | 5,620,253 | 78 | 17 | 5 | +2.9 | 8,139 | 58 | 0.16 |
| Camp Merrill, GA | 1 | 340,123 | 87 | 11 | 2 | −2.2 | 1,416 | 20 | 0.01 |
| Ft. Monroe, VA | 4 | 7,470,180 | 78 | 18 | 4 | +0.0 | 8,049 | 77 | 0.21 |
| Redstone Arsenal, AL | 7 | 21,885,599 | 76 | 19 | 5 | +1.6 | 21,279 | 86 | 0.60 |
| Richmond DGSC, VA | 3 | 5,341,306 | 76 | 19 | 5 | −1.4 | 13,200 | 34 | 0.15 |
| Ft. Rucker, AL | 6 | 17,592,213 | 79 | 17 | 4 | +3.6 | 17,200 | 85 | 0.49 |
| Ft. Stewart, GA | 6 | 15,294,464 | 76 | 20 | 4 | +2.7 | 27,767 | 46 | 0.42 |
| **Region Totals*** | | **$367,112,999** | **77** | **19** | **4** | **+1.9** | **373,661** | **$ 82** | **10.13** |

* Excludes sales for Ft. Buchanan (San Juan), Puerto Rico; data for this store are included in Army's overseas sales.

Main stores with total sq. ft. sales area in italics indicates that the sales area for one or more grocery annexes at that location are included in the main store's sales area total. Sales at annexes also are included in the main store's sales total.

# Army Commissary Sales — FY84

## Western Region

| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| Dugway Prov. Grnds., UT | 2 | $ 1,765,872 | 80 | 14 | 6 | −6.1 | 7,056 | 21 | 0.05 |
| Ft. Huachuca, AZ | 6 | 16,206,412 | 75 | 20 | 5 | +5.3 | 20,087 | 67 | 0.45 |
| Ft. Irwin, CA | 3 | 3,627,810 | 76 | 19 | 5 | +30.4 | 6,594 | 46 | 0.10 |
| Ft. Lewis, WA | 8 | 41,518,103 | 78 | 18 | 4 | −0.2 | 16,540 | 209 | 1.15 |
| Oakland AB, CA | 4 | 7,755,464 | 78 | 18 | 4 | −12.4 | 14,919 | 43 | 0.21 |
| Ft. Ord, CA | 8 | 35,434,257 | 75 | 21 | 4 | +0.9 | 18,190 | 162 | 0.98 |
| Presidio of S.F., CA | 7 | 19,276,643 | 74 | 20 | 6 | −1.5 | 23,264 | 69 | 0.53 |
| Sierra AD, CA | 2 | 2,080,656 | 81 | 16 | 3 | −0.1 | 4,500 | 39 | 0.06 |
| Yuma Prov. Grnds., AZ | 2 | 1,757,937 | 84 | 12 | 4 | −4.2 | 6,125 | 24 | 0.05 |
| **Region Totals*** | | **$129,423,154** | **76** | **19** | **5** | **+0.2** | **117,275** | **$ 92** | **3.57** |

*Excludes sales for Forts Richardson, Greely and Wainwright, AK, and Schofield Barracks, HI; data for these stores are included in Army's overseas report.

Main stores with total sq. ft. sales area in italics indicates that the sales area for one or more grocery annexes at that location are included in the main store's sales area total. Sales at annexes also are included in the main store's sales total.

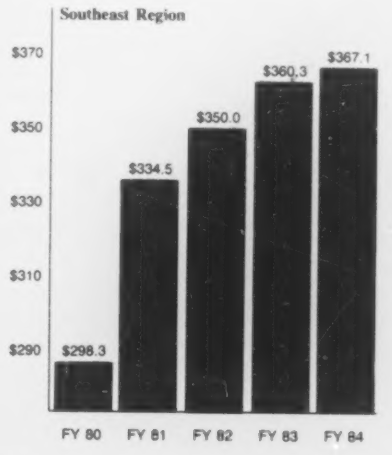
## Totals

| | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|
| | | Grocery | Meat | Produce | | | | |
| **CONUS Totals** | **$1,137,916,959** | **77%** | **19%** | **4%** | **+2.2%** | **1,821,425** | **$ 85** | **31.39%** |

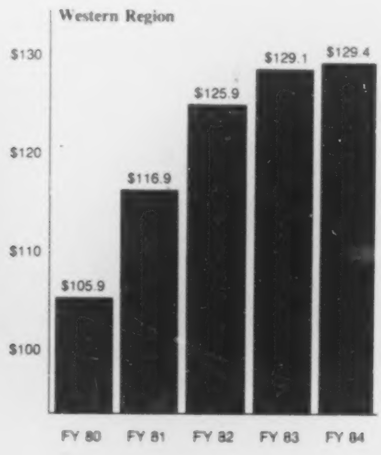
**Notes:** Sales data in this special *Interservice* report exclude the 5 percent commissary surcharge.

The ACV (All Commodity Volume) analysis shows each individual commissary or region FY84 sales total as a percentage of separately combined CONUS and overseas sales of all Army, Air Force, Marine Corps and Navy commissaries. Sales at commissaries in Alaska, Hawaii, Puerto Rico and other locations not contiguous with the 48 continental United States are classed and reported "Overseas." The ACV given for "Worldwide Totals" represents the percent sales share of commissaries operated by that service branch against the FY84 worldwide sales reported for *all* service branches.

**5-Year Total Sales Summary–(TSA)/$ Millions**



**5-Year Total Sales Summary–(TSA)/$ Millions**



## It's A Fact!

Can you name the ten *CONUS* military commissaries that last year reported the highest average monthly dollar sales per square foot of selling space?

1. Ft. Lewis, WA (*$209*)
2. Ft. Jackson, SC (*$182*)
3. MacDill AFB, FL (*$164*)
4. Ft. Ord, CA (*$162*)
5. Carswell AFB, TX (*$155*)
6. West Point, NY (*$139*)
7. Ft. Bliss, TX (*$129*)
8. Ft. Carson, CO (*$124*)
9. Fitzsimons AMC, CO (*$122*)
10. Oakdale ASC, PA (*$121*)

# Army Commissary Sales — FY84

## Army Commissary Store Rankings by ACV CONUS and Overseas . . . based on FY84 sales

The ACV (All Commodity Volume) rankings are provided as a sales and marketing management tool for companies who wish to identify marketing opportunities with accurate sales performance data. The ACV for each CONUS and overseas Army commissary is calculated by dividing the sales totals for *all* CONUS or overseas commissaries of *all* service branches into that individual store's sales total. The overseas ACV for Yongsan in Korea, for example, indicates that 4.14 percent of *all* overseas commissaries' sales, regardless of their service branch affiliation, were generated at Yongsan. Excluded from all sales data in this *Interservice* report are FY84 sales at Coast Guard's two commissaries, one in CONUS (Governors Island, NY) and one overseas (Kodiak, AK), because official data is not available.

### CONUS

| Rank | Store | ACV |
|---|---|---|
| 1 | Ft. Hood, TX | 1.43 |
| 2 | Ft. Bragg, NC | 1.42 |
| 3 | Ft. Bliss, TX | 1.39 |
| 4 | Ft. Belvoir, VA | 1.33 |
| 5 | Ft. Lewis, WA | 1.15 |
| 6 | Ft. Benning, GA | 1.06 |
| 7 | Ft. Ord, CA | 0.98 |
| 8 | Ft. Campbell, KY | 0.92 |
| 9 | Ft. Carson, CO | 0.90 |
| 10 | Ft. Sam Houston, TX | 0.89 |
| 11 | Ft. Sill, OK | 0.87 |
| 12 | Ft. Knox, KY | 0.86 |
| 13 | Cameron Station, VA | 0.85 |
| 14 | Ft. Meade, MD | 0.83 |
| 15 | Ft. Gordon, GA | 0.72 |
| 16 | Walter Reed AMC, DC | 0.70 |
| 17 | Ft. Jackson, SC | 0.62 |
| 18 | Ft. Gillem, GA | 0.61 |
| 19 | Redstone Arsenal, AL | 0.60 |
| 20 | Ft. Polk, LA | 0.59 |
| 21 | Ft. Myers, VA | 0.58 |
| 22 | Ft. Riley, KS | 0.54 |
| 23 | Ft. Eustis, VA | 0.53 |
| 24 | Presidio of S.F., CA | 0.53 |
| 25 | Ft. Lee, VA | 0.53 |
| 26 | Ft. Leavenworth, KS | 0.52 |
| 27 | Ft. Leonard Wood, MO | 0.51 |
| 28 | Ft. Monmouth, NJ | 0.50 |
| 29 | Ft. Rucker, AL | 0.49 |
| 30 | Ft. Devens, MA | 0.46 |
| 31 | Ft. McClellan, AL | 0.45 |
| 32 | Ft. Huachuca, AZ | 0.45 |
| 33 | Ft. Ben Harrison, IN | 0.43 |
| 34 | Granite City AD, IL | 0.43 |
| 35 | Ft. Stewart, GA | 0.42 |
| 36 | Fitzsimons AMC, CO | 0.35 |
| 37 | Aberdeen Prov. Grnds., MD | 0.32 |
| 38 | Selfridge ANG, MI | 0.32 |
| 39 | Hunter AAF, GA | 0.30 |
| 40 | Ft. Hamilton, NY | 0.28 |
| 41 | Carlisle Barracks, PA | 0.27 |
| 42 | West Point, NY | 0.24 |
| 43 | Oakdale ASC, PA | 0.24 |
| 44 | Vint Hill Farms, VA | 0.22 |
| 45 | Oakland AB, CA | 0.21 |
| 46 | Ft. Sheridan, IL | 0.21 |
| 47 | Ft. Monroe, VA | 0.21 |
| 48 | Ft. McNair, DC | 0.19 |
| 49 | Ft. Ritchie, MD | 0.19 |
| 50 | New Cumberland, PA | 0.18 |
| 51 | Edgewood Arsenal, MD | 0.17 |
| 52 | Tobyhanna AD, PA | 0.16 |
| 53 | Ft. McPherson, GA | 0.16 |
| 54 | Richmond DGSC, VA | 0.15 |
| 55 | Ft. Drum, NY | 0.12 |
| 56 | Stewart AB, NY | 0.11 |
| 57 | Rock Island, IL | 0.11 |
| 58 | White Sands, NM | 0.10 |
| 59 | Ft. Irwin, CA | 0.10 |
| 60 | Lexington, KY | 0.08 |
| 61 | Seneca AD, NY | 0.07 |
| 62 | ARDC, NJ | 0.07 |
| 63 | Sierra AD, CA | 0.06 |
| 64 | Dugway Prov. Grnds., AZ | 0.05 |
| 65 | Yuma Prov. Grnds., AZ | 0.05 |
| 66 | Camp Merrill, GA | 0.01 |

### Overseas

| Rank | Store | ACV |
|---|---|---|
| 1 | Yongsan, Korea | 4.14 |
| 2 | Schofield Barracks, HI | 3.17 |
| 3 | Ft. Buchanan, PR | 2.62 |
| 4 | Frankfurt, FRG | 1.65 |
| 5 | Corozal, Panama | 1.61 |
| 6 | Fuerth, FRG | 1.49 |
| 7 | Wiesbaden, FRG | 1.48 |
| 8 | Heidelberg, FRG | 1.34 |
| 9 | Mannheim, FRG | 1.25 |
| 10 | Hanau, FRG | 1.11 |
| 11 | Berlin (Free Zone), FRG | 1.04 |
| 12 | Giessen, FRG | 1.04 |
| 13 | Ft. Richardson, AK | 1.02 |
| 14 | Bremerhaven, FRG | 0.97 |
| 15 | Balboa, Panama | 0.96 |
| 16 | Robinson Barracks, FRG | 0.89 |
| 17 | Augsburg, FRG | 0.84 |
| 18 | Baumholder, FRG | 0.83 |
| 19 | Ft. Wainwright, AK | 0.79 |
| 20 | Schweinfurt, FRG | 0.78 |
| 21 | Taegu, Korea | 0.78 |
| 22 | Sagamihara, Japan | 0.68 |
| 23 | Darmstadt, FRG | 0.64 |
| 24 | Bamberg, FRG | 0.64 |
| 25 | Wuerzberg, FRG | 0.64 |
| 26 | Ansbach, FRG | 0.63 |
| 27 | Karlsruhe, FRG | 0.58 |
| 28 | Chievres, Belgium | 0.56 |
| 29 | Munich, FRG | 0.55 |
| 30 | Patch Barracks, FRG | 0.55 |
| 31 | Ft. Gulick, Panama | 0.54 |
| 32 | Vicenza, Italy | 0.52 |
| 33 | Aschaffenberg, FRG | 0.51 |
| 34 | Grafenwoehr, FRG | 0.51 |
| 35 | Zweibruecken, FRG | 0.50 |
| 36 | Kitzingen, FRG | 0.50 |
| 37 | Pirmasens, FRG | 0.49 |
| 38 | Kobbe/Howard, Panama | 0.48 |
| 39 | Heilbronn, FRG | 0.45 |
| 40 | Schinnen, FRG | 0.44 |
| 41 | Riyadh, Saudi Arabia | 0.43 |
| 42 | Mainz, FRG | 0.41 |
| 43 | Fulda, FRG | 0.41 |
| 44 | Bad Kreuznach, FRG | 0.39 |
| 45 | Neu Ulm, FRG | 0.37 |
| 46 | Gelnhausen, FRG | 0.33 |
| 47 | Kelley Barracks, FRG | 0.33 |
| 48 | Pusan, Korea | 0.29 |
| 49 | Wildflecken, FRG | 0.27 |
| 50 | Livorno, Italy | 0.26 |
| 51 | Worms, FRG | 0.25 |
| 52 | Bad Nauheim, FRG | 0.25 |
| 53 | Ft. Greely, AK | 0.23 |
| 54 | Illesheim, FRG | 0.22 |
| 55 | Dhahran, Saudi Arabia | 0.21 |
| 56 | Ludwigsburg, FRG | 0.20 |
| 57 | Erlangen, FRG | 0.20 |
| 58 | Schwaebisch Gmuend, FRG | 0.19 |
| 59 | Goeppingen, FRG | 0.18 |
| 60 | Cairo, Egypt | 0.17 |
| 61 | Menwith Hill (Harrogate), UK | 0.17 |
| 62 | Bad Kissingen, FRG | 0.17 |
| 63 | Amberg, FRG | 0.14 |
| 64 | Wertheim, FRG | 0.14 |
| 65 | Berchtesgaden, FRG | 0.14 |
| 66 | Bad Hersfeld, FRG | 0.13 |
| 67 | Bindlach, FRG | 0.12 |
| 68 | Crailsheim, FRG | 0.12 |
| 69 | Hohenfels, FRG | 0.12 |
| 70 | Garmisch, FRG | 0.11 |
| 71 | Bad Toelz, FRG | 0.11 |
| 72 | Schwaebisch Hall, FRG | 0.10 |
| 73 | Jidda, Saudi Arabia | 0.09 |
| 74 | Bad Aibling, FRG | 0.07 |
| 75 | Idar Oberstein, FRG | 0.07 |

## It's A Fact!

Did you know that the average monthly sales per square foot of selling space in the *average* military commissary last year totaled $60.30?

# Army Commissary Sales — FY84

## Analysis of Sales by Store and Region (Overseas)

### Midwest Region/Panama

| Store | Store Class | Total Store $ Sales | % of Store Total: Grocery | Meat | Produce | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| Balboa * | 5 | $ 9,105,368 | 84 | 12 | 4 | +11.2 | 16,178 | 47 | 0.96 |
| Corozal | 6 | 15,305,471 | 83 | 13 | 4 | +5.9 | 11,564 | 110 | 1.61 |
| Ft. Gulick | 3 | 5,101,954 | 80 | 15 | 5 | −1.7 | 5,200 | 82 | 0.54 |
| Kobbe/Howard | 3 | 4,579,636 | 81 | 14 | 5 | +10.9 | 5,400 | 71 | 0.48 |
| **Panama Totals** | | **$34,092,429** | **82** | **13** | **5** | **+6.7** | **38,342** | **$ 74** | **3.59** |

* Army's commissary at Balboa closed 9/30/84.

### Southeast Region/Puerto Rico

| Store | Store Class | Total Store $ Sales | % of Store Total: Grocery | Meat | Produce | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| Ft. Buchanan | 8 | $24,862,351 | 96 | – | 4 | −3.3 | 26,576 | $78 | 2.62 |

### Western Region/Alaska, Hawaii & Korea

| Store | Store Class | Total Store $ Sales | % of Store Total: Grocery | Meat | Produce | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| Ft. Greely, AK | 2 | $ 2,145,920 | 74 | 20 | 6 | +2.4 | 6,290 | 28 | 0.23 |
| Pusan, Korea | 2 | 2,747,342 | 87 | 8 | 5 | −1.3 | 2,205 | 103 | 0.29 |
| Ft. Richardson, AK | 5 | 9,688,061 | 76 | 19 | 5 | +2.4 | 15,713 | 51 | 1.02 |
| Sagamihara, Japan | 4 | 6,479,502 | 84 | 12 | 4 | +7.2 | *19,053* | 28 | 0.68 |
| Schofield Barracks, HI | 8 | 30,162,216 | 75 | 19 | 6 | −1.1 | *32,718* | 77 | 3.17 |
| Taegu, Korea | 4 | 7,365,908 | 89 | 7 | 4 | +0.2 | 5,900 | 104 | 0.78 |
| Ft. Wainwright, AK | 4 | 7,472,483 | 74 | 21 | 5 | +24.9 | 8,066 | 77 | 0.79 |
| Yongsan, Korea | 8 | 39,348,077 | 87 | 10 | 3 | −0.4 | 33,614 | 97 | 4.14 |
| **Western (Overseas) Totals** | | **$105,409,509** | **81** | **14** | **5** | **+1.6** | **123,559** | **$ 71** | **11.09** |

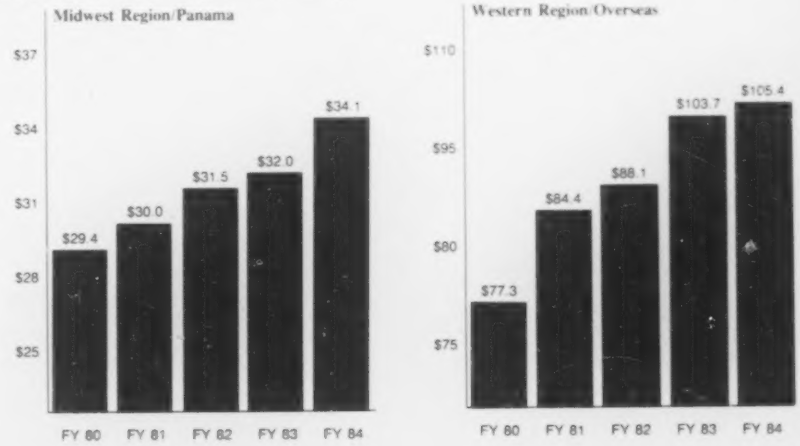
Main stores with total sq. ft. sales area in italics indicates that the sales area for one or more grocery annexes at that location are included in the main store's sales area total. Sales at annexes also are included in the main store's sales total.

**Notes:** Sales data in this special *Interservice* report exclude the 5 percent commissary surcharge.

Sales classifications for Army commissaries are based upon total average monthly sales, as follows:
Class 1 Up to $100,000
Class 2 $100,001-$300,000
Class 3 $300,001-$500,000
Class 4 $500,001-$750,000
Class 5 $750,001-$1,000,000
Class 6 $1,000,001-$1,500,000
Class 7 $1,500,001-$2,000,000
Class 8 Over $2,000,000

The ACV (All Commodity Volume) analysis shows each individual commissary or region FY84 sales total as a percentage of separately combined CONUS and overseas sales of all Army, Air Force, Marine Corps and Navy commissaries. Sales at commissaries in Alaska, Hawaii, Puerto Rico, and other locations not contiguous with the 48 continental United States are classed and reported "Overseas." The ACV given for "Worldwide Totals" represents the percent sales share of commissaries operated by that service branch against the FY84 worldwide sales reported for *all* service branches.

5-Year Total Sales Summary – (TSA)/$ Millions



# Army Commissary Sales — FY84

## European Region

| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| Amberg, FRG | 2 | $ 1,370,204 | 89 | 7 | 4 | +5.5 | 2,640 | 43 | 0.14 |
| Ansbach, FRG | 3 | 5,982,359 | 84 | 11 | 5 | −1.4 | 11,961 | 42 | 0.63 |
| Aschaffenburg, FRG | 3 | 4,841,126 | 84 | 11 | 5 | +6.3 | 9,760 | 41 | 0.51 |
| Augsburg, FRG | 4 | 7,954,958 | 84 | 11 | 5 | +0.3 | 9,681 | 68 | 0.84 |
| Bad Aibling, FRG | 1 | 702,989 | 84 | 10 | 6 | +7.7 | 4,250 | 14 | 0.07 |
| Bad Hersfeld, FRG | 2 | 1,259,760 | 88 | 7 | 5 | +6.0 | 4,375 | 24 | 0.13 |
| Bad Kissingen, FRG | 2 | 1,575,690 | 86 | 9 | 5 | +5.6 | 2,347 | 56 | 0.17 |
| Bad Kreuznach, FRG | 3 | 3,668,064 | 86 | 9 | 5 | −2.3 | *12,190* | 25 | 0.39 |
| Bad Nauheim, FRG | 2 | 2,381,174 | 85 | 10 | 5 | +12.1 | 6,176 | 32 | 0.25 |
| Bad Toelz, FRG | 1 | 1,033,216 | 82 | 11 | 7 | −0.6 | 4,585 | 18 | 0.11 |
| Bamberg, FRG | 4 | 6,077,005 | 85 | 11 | 4 | +6.3 | 9,236 | 55 | 0.64 |
| Baumholder, FRG | 4 | 7,914,579 | 85 | 10 | 5 | −3.6 | *16,441* | 40 | 0.83 |
| Berchtesgaden, FRG | 2 | 1,285,394 | 83 | 14 | 3 | −8.7 | 22,963 | 5 | 0.14 |
| Berlin (Free Zone), FRG | 5 | 9,884,227 | 81 | 11 | 8 | +4.1 | 14,147 | 58 | 1.04 |
| Bindlach, FRG | 1 | 1,128,341 | 88 | 8 | 4 | −2.8 | 3,279 | 29 | 0.12 |
| Bremerhaven, FRG | 5 | 9,214,824 | 86 | 10 | 4 | +6.8 | *19,152* | 40 | 0.97 |
| Cairo, Egypt | 2 | 1,599,476 | 94 | – | 6 | +1.8 | N.A. | N.A. | 0.17 |
| Chievres, Belgium | 3 | 5,274,800 | 84 | 11 | 5 | +0.9 | 10,609 | 41 | 0.56 |
| Crailsheim, FRG | 1 | 1,118,720 | 85 | 10 | 5 | −7.4 | 2,390 | 39 | 0.12 |
| Darmstadt, FRG | 4 | 6,100,238 | 84 | 12 | 4 | +4.5 | *15,140* | 34 | 0.64 |
| Dhahran, Saudi Arabia | 2 | 2,040,503 | 92 | – | 8 | −2.6 | N.A. | N.A. | 0.21 |
| Erlangen, FRG | 2 | 1,864,011 | 88 | 8 | 4 | +3.5 | 2,410 | 64 | 0.20 |
| Frankfurt, FRG | 6 | 15,727,350 | 83 | 12 | 5 | −2.6 | *17,670* | 74 | 1.65 |
| Fuerth, FRG | 6 | 14,123,404 | 85 | 11 | 4 | +6.5 | *12,250* | 96 | 1.49 |
| Fulda, FRG | 3 | 3,864,008 | 83 | 12 | 5 | +6.1 | 6,718 | 47 | 0.41 |
| Garmisch, FRG | 1 | 1,092,571 | 83 | 10 | 7 | −4.4 | 2,895 | 31 | 0.11 |
| Gelnhausen, FRG | 2 | 3,174,622 | 87 | 9 | 4 | +5.0 | *8,671* | 30 | 0.33 |
| Giessen, FRG | 5 | 9,877,032 | 86 | 10 | 4 | +9.9 | *19,954* | 41 | 1.04 |
| Goeppingen, FRG | 2 | 1,749,575 | 86 | 9 | 5 | +1.9 | 2,547 | 57 | 0.18 |
| Grafenwoehr, FRG | 3 | 4,827,462 | 86 | 9 | 5 | +18.9 | *8,349* | 48 | 0.51 |
| Hanau, FRG | 5 | 10,557,282 | 86 | 10 | 4 | +5.6 | *11,147* | 79 | 1.11 |
| Heidelberg, FRG | 6 | 12,697,483 | 83 | 12 | 5 | +3.8 | 18,700 | 57 | 1.34 |
| Heilbronn, FRG | 3 | 4,240,807 | 83 | 12 | 5 | +0.2 | *9,328* | 38 | 0.45 |
| Hohenfels, FRG | 1 | 1,112,890 | 87 | 9 | 4 | −2.0 | *3,390* | 27 | 0.12 |
| Idar Oberstein, FRG | 1 | 640,374 | 88 | 8 | 4 | +0.8 | 2,580 | 20 | 0.07 |
| Illesheim, FRG | 2 | $ 2,086,799 | 85 | 10 | 5 | +5.3 | 4,701 | 37 | 0.22 |
| Jidda, Saudi Arabia | 1 | 879,144 | 92 | – | 8 | −17.0 | 3,356 | 22 | 0.09 |
| Karlsruhe, FRG | 3 | 5,498,203 | 87 | 9 | 4 | −11.2 | *8,037* | 57 | 0.58 |
| Kelley Barracks, FRG | 2 | 3,163,429 | 83 | 11 | 6 | −2.8 | 9,465 | 28 | 0.33 |
| Kitzingen, FRG | 3 | 4,751,999 | 83 | 12 | 5 | +20.6 | 11,139 | 36 | 0.50 |
| Livorno, Italy | 2 | 2,445,459 | 84 | 11 | 5 | −2.7 | 5,540 | 37 | 0.26 |

# Army Commissary Sales — FY84

## European Region, continued.

| Store | Store Class | Total Store $ Sales | % of Store Total Grocery | % of Store Total Meat | % of Store Total Produce | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| Ludwigsburg, FRG | 2 | 1,866,019 | 86 | 10 | 4 | −25.9 | 4,428 | 35 | 0.20 |
| Mainz, FRG | 3 | 3,870,893 | 85 | 10 | 5 | −5.3 | *2,990* | 107 | 0.41 |
| Mannheim, FRG | 5 | 11,899,701 | 83 | 12 | 5 | −2.4 | 9,093 | 109 | 1.25 |
| Menwith Hill (Harrogate), UK | 2 | 1,583,866 | 79 | 15 | 6 | +1.7 | 2,752 | 48 | 0.17 |
| Munich, FRG | 3 | 5,263,623 | 80 | 13 | 7 | −3.1 | 10,240 | 43 | 0.55 |
| Neu Ulm, FRG | 2 | 3,543,261 | 83 | 13 | 4 | −9.7 | 7,160 | 41 | 0.37 |
| Patch Barracks, FRG | 3 | 5,253,817 | 82 | 13 | 5 | −5.6 | 4,315 | 101 | 0.55 |
| Pirmasens, FRG | 3 | 4,631,366 | 86 | 10 | 4 | −1.0 | *7,133* | 54 | 0.49 |
| Riyadh, Saudi Arabia | 3 | 4,075,158 | 92 | – | 8 | −6.9 | 4,507 | 75 | 0.43 |
| Robinson Barracks, FRG | 4 | 8,421,496 | 83 | 12 | 5 | +41.3 | 10,612 | 66 | 0.89 |
| Schinnen, FRG | 3 | 4,223,256 | 83 | 13 | 4 | +3.7 | 11,053 | 32 | 0.44 |
| Schwaebisch Gmuend, FRG | 2 | 1,784,434 | 85 | 10 | 5 | +6.0 | 4,222 | 35 | 0.19 |
| Schwaebisch Hall, FRG | 1 | 915,170 | 85 | 10 | 5 | −0.4 | 3,816 | 20 | 0.10 |
| Schweinfurt, FRG | 4 | 7,391,597 | 84 | 11 | 5 | +7.2 | 17,833 | 34 | 0.78 |
| Vicenza, Italy | 3 | 4,929,529 | 84 | 10 | 6 | +3.6 | 3,732 | 165 | 0.52 |
| Wertheim, FRG | 2 | 1,352,650 | 86 | 9 | 5 | −2.4 | 3,617 | 3[illegible] | 0.14 |
| Wiesbaden, FRG | 6 | 14,088,702 | 82 | 12 | 6 | +5.4 | *1,836* | 639 | 1.48 |
| Wildflecken, FRG | 2 | 2,597,613 | 88 | 8 | 4 | +3.3 | *5,277* | 41 | 0.27 |
| Worms, FRG | 2 | 2,399,747 | 82 | 13 | 5 | +4.1 | 5,245 | 38 | 0.25 |
| Wuerzburg, FRG | 4 | 6,051,023 | 85 | 11 | 4 | +0.2 | 8,100 | 62 | 0.64 |
| Zweibruecken, FRG | 3 | 4,769,312 | 83 | 12 | 5 | −4.5 | 9,334 | 4[illegible] | 0.50 |
| **European Region Totals** | | **$287,693,784** | **84** | **11** | **5** | **+2.7** | **497,464** | **$ 48*** | **30.27** |

* Calculated on the basis of *Interservice* estimates of sales area at Cairo and Dhahran at 5,000 sq. ft. each.

N.A. = Not available.

Main stores with total sq. ft. sales area in italics indicates that the sales area for one or more grocery annexes at that location are included in the main store's sales area total. Sales at annexes also are included in the main store's sales total.

**Notes:** Sales data in this special *Interservice* report exclude the 5 percent commissary surcharge.

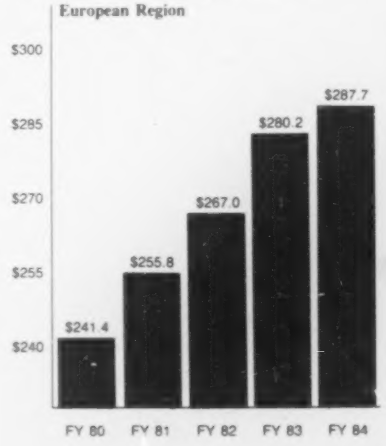
The ACV (All Commodity Volume) analysis shows each individual commissary or region FY84 sales total as a percentage of separately combined CONUS and overseas sales of all Army, Air Force, Marine Corps and Navy commissaries. Sales at commissaries in Alaska, Hawaii, Puerto Rico and other locations not contiguous with the 48 continental United States are classed and reported "Overseas." The ACV given for "Worldwide Totals" represents the percent sales share of commissaries operated by that service branch against the FY84 worldwide sales reported for *all* service branches.

## It's A Fact!

Did you know which are the ten *CONUS* military commissaries with the highest FY84 total store sales increase?

1. Los Angeles AFS, CA (*+515%*)
2. Camp Lejeune (Tarawa Terrace), NC (*+30.6%*)
3. Ft. Irwin, CA (*+30.4%*)
4. Miramar, CA (*+26.8%*)
5. Charleston NS, SC (*+25.1%*)
6. Pensacola, FL (*+25.1%*)
7. Charleston NWS, SC (*+24.4%*)
8. Dahlgren, VA (*21.0%*)
9. Parris Island, SC (*+20.5%*)
10. Cutler, ME (*+19.2%*)

**5-Year Total Sales Summary – (TSA)/$ Millions**



# Army Commissary Sales — FY84

## Totals

| | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|
| | | Grocery | Meat | Produce | | | | |
| **Overseas Totals** | **$452,058,073** | **84%** | **11%** | **5%** | **+2.4%** | **685,981** | **$ 55** | **47.57%** |
| **Worldwide Totals** | **$1,589,975,032** | **79%** | **17%** | **4%** | **+2.2%** | **1,802,907** | **$ 74** | **34.75%** |

**Notes:** Sales data in this special *Interservice* report exclude the 5 percent commissary surcharge.

The ACV (All Commodity Volume) analysis shows each individual commissary or region FY84 sales total as a percentage of separately combined CONUS and overseas sales of all Army, Air Force, Marine Corps and Navy commissaries. Sales at commissaries in Alaska, Hawaii, Puerto Rico and other locations not contiguous with the 48 continental United States are classed and reported "Overseas." The ACV given for "Worldwide Totals" represents the percent sales share of commissaries operated by that service branch against the FY84 worldwide sales reported for *all* service branches.

## Army Commissary Store Rankings by Average Monthly $ Sales/Square Foot . . . based on FY84 sales

*Overseas stores are in italics.*
N.A. = Not available.

| Rank | Store | Avg. Mo. $ Sales/ Sq. Ft. |
|---|---|---|
| *1* | *Wiesbaden, FRG* | *639* |
| 2 | Ft. Lewis, WA | 209 |
| 3 | Ft. Jackson, SC | 182 |
| *4* | *Vicenza, Italy* | *165* |
| 5 | Ft. Ord, CA | 162 |
| 6 | Ft. Belvoir, VA | 152 |
| 7 | West Point, NY | 139 |
| 8 | Ft. Bliss, TX | 129 |
| 9 | Ft. Carson, CO | 124 |
| 10 | Fitzsimons AMC, CO | 122 |
| 11 | Oakdale ASC, PA | 121 |
| 12 | Ft. Hood, TX | 120 |
| *13* | *Corozal, Panama* | *110* |
| *14* | *Mannheim, FRG* | *109* |
| 15 | Ft. Campbell, KY | 108 |
| *16* | *Mainz, FRG* | *107* |
| 17 | Ft. Ritchie, MD | 106 |
| *18* | *Taegu, Korea* | *104* |
| *19* | *Pusan, Korea* | *103* |
| 20 | Ft. Bragg, NC | 102 |
| *21* | *Patch Barracks, FRG* | *101* |
| 22 | Ft. Sam Houston, TX | 100 |
| 23 | Ft. Benning, GA | 98 |
| 24 | Selfridge ANG, MI | 98 |
| *25* | *Yongsan, Korea* | *97* |
| *26* | *Fuerth, FRG* | *96* |
| 27 | Ft. Devens, MA | 94 |
| 28 | Ft. Meade, MD | 92 |
| 29 | Ft. Myer, VA | 92 |
| 30 | Ft. Polk, LA | 91 |
| 31 | Ft. McClellan, AL | 86 |
| 32 | Redstone Arsenal, AL | 86 |
| 33 | Ft. Rucker, AL | 85 |
| 34 | Ft. Gillem, GA | 84 |
| 35 | Ft. Gordon, GA | 84 |
| 36 | Ft. Leonard Wood, MO | 84 |
| 37 | Walter Reed AMC, DC | 84 |
| *38* | *Ft. Gulick, Panama* | *82* |
| 39 | Ft. Sill, OK | 82 |
| 40 | Ft. Ben Harrison, IN | 81 |
| 41 | Vint Hill Farms, VA | 81 |
| *42* | *Hanau, FRG* | *79* |
| *43* | *Ft. Buchanan, PR* | *78* |
| 44 | Lexington, KY | 78 |
| 45 | Ft. Monroe, VA | 77 |
| *46* | *Ft. Wainwright, AK* | *77* |
| 47 | Ft. Sheridan, IL | 77 |
| *48* | *Schofield Barracks, HI* | *77* |
| *49* | *Riyadh, Saudi Arabia* | *75* |
| *50* | *Frankfurt, FRG* | *74* |
| 51 | Carlisle Barracks, PA | 73 |
| 52 | Ft. Knox, KY | 72 |
| *53* | *Kobbe/Howard, Panama* | *71* |
| 54 | Aberdeen Prov. Grnds., MD | 69 |
| 55 | Ft. Leavenworth, KS | 69 |
| 56 | Ft. Riley, KS | 69 |
| 57 | Presidio of S.F., CA | 69 |
| *58* | *Augsburg, FRG* | *68* |
| 59 | Cameron Station, VA | 68 |
| 60 | Ft. Huachuca, AZ | 67 |
| *61* | *Robinson Barracks, FRG* | *66* |
| 62 | Ft. Eustis, VA | 65 |
| 63 | Ft. Hamilton, NY | 65 |
| *64* | *Erlangen, FRG* | *64* |
| 65 | Ft. Lee, VA | 63 |
| 66 | Ft. Monmouth, NJ | 63 |
| 67 | Granite City AD, IL | 62 |
| *68* | *Wuerzburg, FRG* | *62* |
| 69 | Stewart AB, NY | 59 |
| *70* | *Berlin (Free Zone), FRG* | *58* |
| 71 | Ft. McPherson, GA | 58 |
| *72* | *Goeppingen, FRG* | *57* |
| *73* | *Heidelberg, FRG* | *57* |
| *74* | *Karlsruhe, FRG* | *57* |
| *75* | *Bad Kissingen, FRG* | *56* |
| *76* | *Bamberg, FRG* | *55* |
| *77* | *Pirmasens, FRG* | *54* |
| 78 | Seneca AD, NY | 54 |
| 79 | Tobyhanna AD, PA | 53 |
| *80* | *Ft. Richardson, AK* | *51* |
| 81 | Hunter AAF, GA | 51 |
| 82 | Rock Island, IL | 49 |
| *83* | *Grafenwoehr, FRG* | *48* |
| *84* | *Menwith Hill (Harrogate), UK* | *48* |
| *85* | *Balboa, Panama* | *47* |
| 86 | Ft. McNair, DC | 47 |
| *87* | *Fulda, FRG* | *47* |
| 88 | Ft. Irwin, CA | 46 |
| 89 | Ft. Stewart, GA | 46 |
| 90 | White Sands, NM | 45 |
| 91 | Edgewood Arsenal, MD | 44 |
| *92* | *Amberg, FRG* | *43* |
| *93* | *Munich, FRG* | *43* |
| 94 | Oakland AB, CA | 43 |
| *95* | *Zweibruecken, FRG* | *43* |
| *96* | *Ansbach, FRG* | *42* |
| *97* | *Aschaffenberg, FRG* | *41* |
| *98* | *Chievres, Belgium* | *41* |
| *99* | *Giessen, FRG* | *41* |
| *100* | *Neu Ulm, FRG* | *41* |
| *101* | *Wildflecken, FRG* | *41* |
| *102* | *Baumholder, FRG* | *40* |
| *103* | *Bremerhaven, FRG* | *40* |
| *104* | *Crailsheim, FRG* | *39* |
| 105 | Sierra AD, CA | 39 |
| *106* | *Heilbronn, FRG* | *38* |
| *107* | *Worms, FRG* | *38* |
| *108* | *Illesheim, FRG* | *37* |
| *109* | *Livorno, Italy* | *37* |
| *110* | *Kitzingen, FRG* | *36* |
| 111 | Ft. Drum, NY | 35 |
| *112* | *Ludwigsburg, FRG* | *35* |
| *113* | *Schwaebisch Gmuend, FRG* | *35* |
| *114* | *Darmstadt, FRG* | *34* |
| 115 | Richmond DGSC, VA | 34 |
| *116* | *Schweinfurt, FRG* | *34* |
| 117 | ARDC, NJ | 32 |
| *118* | *Bad Nauheim, FRG* | *32* |
| 119 | New Cumberland, PA | 32 |
| *120* | *Schinnen, FRG* | *32* |
| *121* | *Garmisch, FRG* | *31* |
| *122* | *Wertheim, FRG* | *31* |
| *123* | *Gelnhausen, FRG* | *30* |
| *124* | *Bindlach, FRG* | *29* |
| *125* | *Ft. Greely, AK* | *28* |
| *126* | *Kelley Barracks, FRG* | *28* |
| *127* | *Sagamihara, Japan* | *28* |
| *128* | *Hohenfels, FRG* | *27* |
| *129* | *Bad Kruecznach, FRG* | *25* |
| *130* | *Bad Hersfeld, FRG* | *24* |
| 131 | Yuma Prov. Grnds., AZ | 24 |
| *132* | *Jidda, Saudi Arabia* | *22* |
| 133 | Dugway Prov. Grnds., UT | 21 |
| 134 | Camp Merrill, GA | 20 |
| *135* | *Idar Oberstein, FRG* | *20* |
| *136* | *Schwaebisch Hall, FRG* | *20* |
| *137* | *Bad Toelz, FRG* | *18* |
| *138* | *Bad Aibling, FRG* | *14* |
| *139* | *Berchtesgaden, FRG* | *5* |
| – | *Cairo, Egypt* | *N.A.* |
| – | *Dhahran, Saudi Arabia* | *N.A.* |

# Marine Corps Commissary Sales — FY84

## Analysis of Sales by Store and Complex (Continental United States)

### East Coast Complex

| Store | Store Class | Total Store $ Sales | % of Store Total: Grocery | % of Store Total: Meat | % of Store Total: Produce | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| Camp Lejeune (Hadnot Point), NC | 6 | $12,325,175 | 74 | 22 | 4 | +9.2 | 22,000 | 47 | 0.34 |
| Camp Lejeune (Tarawa Terrace), NC | 6 | 12,627,366 | 74 | 21 | 5 | +30.6 | 24,756 | 43 | 0.35 |
| Cherry Point, NC | 6 | 15,384,917 | 79 | 16 | 5 | +15.2 | 18,655 | 69 | 0.42 |
| New River, NC | 2 | 2,642,397 | 76 | 19 | 5 | +17.0 | 6,344 | 35 | 0.07 |
| Parris Island, SC | 4 | 7,291,479 | 75 | 19 | 6 | +20.5 | 12,737 | 48 | 0.20 |
| **Complex Totals** | | **$50,271,334** | **76** | **19** | **5** | **+17.9** | **84,492** | **$50** | **1.39** |

**Notes:** Sales data in this special *Interservice* report exclude the 5 percent commissary surcharge.

Sales classifications for Marine Corps commissaries are based upon total average monthly sales, as follows:
Class 1 Up to $100,000
Class 2 $100,001-$300,000
Class 3 $300,001-$500,000
Class 4 $500,001-$750,000
Class 5 $750,001-$1,000,000
Class 6 $1,000,001-$1,500,000
Class 7 $1,500,001-$2,000,000
Class 8 Over $2,000,000

The ACV (All Commodity Volume) analysis shows each individual commissary or complex FY84 sales total as a percentage of separately combined CONUS and overseas sales of all Army, Air Force, Marine Corps and Navy commissaries. Sales at commissaries in Alaska, Hawaii, Puerto Rico and other locations not contiguous with the 48 continental United States are classed and reported "Overseas." The ACV given for "Worldwide Totals" represents the percent sales share of commissaries operated by that service branch against the FY84 worldwide sales reported for *all* service branches.

# Marine Corps Commissary Coupon Redemptions — FY84

## CONUS

| Store | Number | % Share CONUS | % Share Worldwide | $ Value | % Share CONUS | % Share Worldwide |
|---|---|---|---|---|---|---|
| Albany, GA | 179,440 | 3.8 | 3.6 | 49,279 | 3.8 | 3.6 |
| Barstow, CA | 72,265 | 1.5 | 1.5 | 24,730 | 1.9 | 1.8 |
| Camp Pendleton, CA | 634,210 | 13.6 | 12.9 | 194,593 | 15.0 | 14.3 |
| Cherry Point, NC | 465,434 | 10.0 | 9.5 | 123,592 | 9.6 | 9.1 |
| El Toro, CA | 880,261 | 18.9 | 17.9 | 244,920 | 19.0 | 18.0 |
| Hadnot Point, NC | 387,941 | 8.3 | 7.9 | 103,670 | 8.0 | 7.6 |
| New River, NC | 64,836 | 1.4 | 1.3 | 17,104 | 1.3 | 1.3 |
| Parris Island, SC | 197,341 | 4.2 | 4.0 | 51,092 | 4.0 | 3.8 |
| Quantico, VA | 968,012 | 20.8 | 19.7 | 260,543 | 20.2 | 19.1 |
| San Onofre, CA | 97,712 | 2.0 | 2.0 | 27,862 | 2.1 | 2.1 |
| Tarawa Terrace, NC | 412,678 | 8.9 | 8.4 | 109,971 | 8.5 | 8.1 |
| Twentynine Palms, CA | 184,393 | 4.0 | 3.7 | 52,186 | 4.0 | 3.8 |
| Yuma, AZ | 119,924 | 2.6 | 2.4 | 33,202 | 2.6 | 2.4 |
| **CONUS Totals** | **4,664,447** | **100.0%** | **94.8%** | **$1,292,744** | **100.0%** | **95.0%** |

## Overseas

| Store | Number | % Share Overseas | % Share Worldwide | $ Value | % Share Overseas | % Share Worldwide |
|---|---|---|---|---|---|---|
| Iwakuni, Japan | –0– | –0– | –0– | –0– | –0– | –0– |
| Kaneohe Bay, HI | 254,133 | 100.0 | 5.2 | 68,877 | 100.0 | 5.0 |
| **Overseas Totals** | **254,133** | **100.0%** | **5.2%** | **$68,877** | **100.0%** | **5.0%** |
| **Worldwide Totals** | **4,918,580** | | **100.0%** | **$1,361,621** | | **100.0%** |

# Marine Corps Commissary Sales — FY84

## West Coast Complex

| Store | Store Class | Total Store $ Sales | % of Store Total Grocery | Meat | Produce | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| Barstow, CA | 2 | $ 2,720,604 | 76 | 18 | 6 | +17.3 | 6,283 | 36 | 0.08 |
| Camp Pendleton, CA | 7 | 19,873,904 | 73 | 20 | 7 | +4.6 | 20,240 | 82 | 0.55 |
| Camp Pendleton (San Onofre), CA | 2 | 3,516,999 | 77 | 16 | 7 | +8.3 | 8,674 | 34 | 0.10 |
| El Toro, CA | 7 | 21,535,950 | 77 | 17 | 6 | +5.6 | 26,520 | 68 | 0.59 |
| Twentynine Palms, CA | 4 | 7,084,352 | 76 | 18 | 6 | +10.5 | 11,000 | 54 | 0.20 |
| Yuma, AZ | 3 | 5,532,791 | 78 | 17 | 5 | +10.7 | 12,630 | 37 | 0.15 |
| **Complex Totals** | | **$60,264,600** | **75** | **18** | **7** | **+6.9** | **85,347** | **$59** | **1.66** |

## Stand-Alone Stores

| Store | Store Class | Total Store $ Sales | % of Store Total Grocery | Meat | Produce | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| Albany, GA | 3 | $ 5,395,281 | 76 | 19 | 5 | +0.6 | 15,325 | 29 | 0.15 |
| Quantico, VA | 7 | 21,252,534 | 75 | 20 | 5 | +12.3 | 21,300 | 83 | 0.59 |

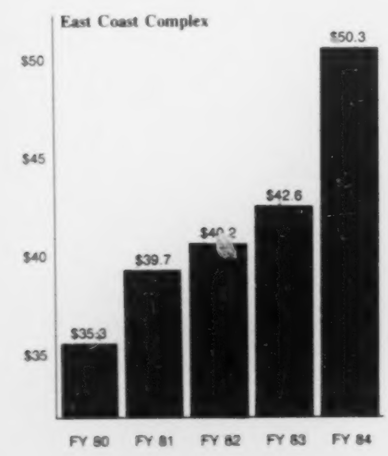
## Totals

| | Total Store $ Sales | % of Store Total Grocery | Meat | Produce | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|
| **CONUS Totals** | **$137,183,749** | **75%** | **19%** | **6%** | **+11.3%** | **206,464** | **$ 55** | **3.78%** |

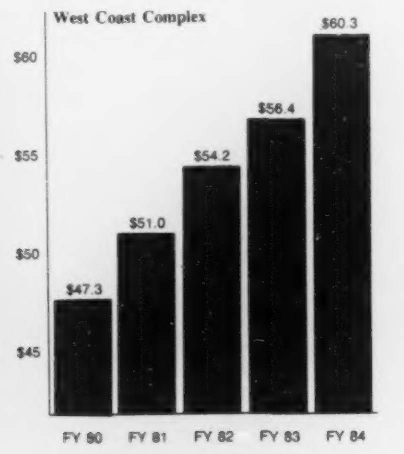
**Notes:** Sales data in this special *Interservice* report exclude the 5 percent commissary surcharge.

The ACV (All Commodity Volume) analysis shows each individual commissary or complex FY84 sales total as a percentage of separately combined CONUS and overseas sales of all Army, Air Force, Marine Corps and Navy commissaries. Sales at commissaries in Alaska, Hawaii, Puerto Rico and other locations not contiguous with the 48 continental United States are classed and reported "Overseas." The ACV given for "Worldwide Totals" represents the percent sales share of commissaries operated by that service branch against the FY84 worldwide sales reported for *all* service branches.

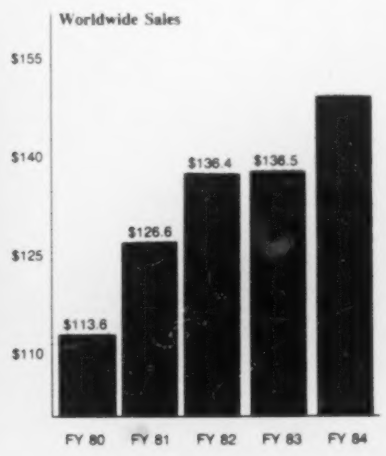
**5-Year Total Sales Summary—USMC/$ Millions**



**5-Year Total Sales Summary—USMC/$ Millions**



**5-Year Total Sales Summary—USMC/$ Millions**



# Marine Corps Commissary Sales — FY84

## Analysis of Sales by Store (Overseas)

### Overseas

| Store | Store Class | Total Store $ Sales | % of Store Total Grocery | % of Store Total Meat | % of Store Total Produce | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| Iwakuni, Japan | 2 | $ 2,411,668 | 82 | 15 | 3 | +7.4 | 5,010 | 40 | 0.25 |
| Kaneohe Bay, HI | 5 | 11,456,174 | 76 | 17 | 7 | +4.0 | 13,800 | 69 | 1.21 |

### Totals

| | Total Store $ Sales | % of Store Total Grocery | % of Store Total Meat | % of Store Total Produce | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|
| **Overseas Totals** | **$13,867,842** | **77%** | **16%** | **7%** | **+4.6%** | **18,810** | **$ 61** | **1.46%** |
| **Worldwide Totals** | **$151,051,591** | **75%** | **19%** | **6%** | **+10.6%** | **225,274** | **$ 56** | **3.30%** |

**Notes:** Sales data in this special *Interservice* report exclude the 5 percent commissary surcharge.

Sales classifications for Marine Corps commissaries are based upon total average monthly sales, as follows:

Class 1 Up to $100,000
Class 2 $100,001-$300,000
Class 3 $300,001-$500,000
Class 4 $500,001-$750,000
Class 5 $750,001-$1,000,000
Class 6 $1,000,001-$1,500,000
Class 7 $1,500,001-$2,000,000
Class 8 Over $2,000,000

The ACV (All Commodity Volume) analysis shows each individual commissary or complex FY84 sales total as a percentage of separately combined CONUS and overseas sales of all Army, Air Force, Marine Corps and Navy commissaries. Sales at commissaries in Alaska, Hawaii, Puerto Rico and other locations not contiguous with the 48 continental United States are classed and reported "Overseas." The ACV given for "Worldwide Totals" represents the percent sales share of commissaries operated by that service branch against the FY84 worldwide sales reported for *all* service branches.

## Marine Corps Commissary Store Rankings by ACV CONUS and Overseas... based on FY84 sales

The ACV (All Commodity Volume) rankings are provided as a sales and marketing management tool for companies who wish to identify marketing opportunities with accurate sales performance data. The ACV for each CONUS and overseas Marine Corps commissary is calculated by dividing the sales totals for *all* CONUS or overseas commissaries of *all* service branches into that individual store's sales total. The CONUS ACV for El Toro, CA, for example, indicates that 0.59 percent of *all* CONUS commissaries' sales, regardless of their service branch affiliation, were generated at El Toro. Excluded from all sales data in this *Interservice* report are FY84 sales at Coast Guard's two commissaries, one in CONUS (Governors Island, NY) and one overseas (Kodiak, AK), because official data are not available.

### CONUS

| Rank | Store | ACV |
|---|---|---|
| 1 | El Toro, CA | 0.59 |
| 2 | Quantico, VA | 0.59 |
| 3 | Camp Pendleton, CA | 0.55 |
| 4 | Cherry Point, NC | 0.42 |
| 5 | Camp Lejeune (Tarawa Terrace), NC | 0.35 |
| 6 | Camp Lejeune (Hadnot Point), NC | 0.34 |
| 7 | Parris Island, SC | 0.20 |
| 8 | Twentynine Palms, CA | 0.20 |
| 9 | Yuma, AZ | 0.15 |
| 10 | Albany, GA | 0.15 |
| 11 | Camp Pendleton (San Onofre), CA | 0.10 |
| 12 | Barstow, CA | 0.08 |
| 13 | New River, NC | 0.07 |

**Total Marine Corps CONUS ACV** **3.78**

### Overseas

| Rank | Store | ACV |
|---|---|---|
| 1 | Kaneohe Bay, HI | 0.21 |
| 2 | Iwakuni, Japan | 0.25 |

**Total Marine Corps Overseas ACV** **1.46**

## Marine Corps Commissary Rankings by Average Monthly $ Sales/ Square Foot... based on FY84 sales

*Overseas stores are in italics.*

| Rank | Store | Avg. Mo. $ Sales/ Sq. Ft. |
|---|---|---|
| 1 | Quantico, VA | 83 |
| 2 | Camp Pendleton, CA | 82 |
| 3 | Cherry Point, NC | 69 |
| *4* | *Kaneohe Bay, HI* | *69* |
| 5 | El Toro, CA | 68 |
| 6 | Twentynine Palms, CA | 54 |
| 7 | Parris Island, SC | 48 |
| 8 | Camp Lejeune (Hadnot Point), NC | 47 |
| 9 | Camp Lejeune (Tarawa Terrace), NC | 43 |
| *10* | *Iwakuni, Japan* | *40* |
| 11 | Yuma, AZ | 37 |
| 12 | Barstow, CA | 36 |
| 13 | New River, NC | 35 |
| 14 | Camp Pendleton (San Onofre), CA | 34 |
| 15 | Albany, GA | 29 |

# Navy Commissary Sales — FY84

## Analysis of Sales by Store & Region/Group/Division (Continental United States)

### Auburn Division

| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| Bangor, WA | 5 | $10,341,218 | 75 | 17 | 8 | N/A | 22,000 | 39 | 0.29 |
| Bremerton, WA | 6 | 9,007,434 | 75 | 18 | 7 | −35.2 | 12,352 | 61 | 0.25 |
| Seattle, WA | 6 | 17,006,653 | 74 | 20 | 6 | +4.2 | 13,500 | 105 | 0.47 |
| Whidbey Island, WA | 5 | 11,667,982 | 75 | 17 | 8 | +10.6 | 12,354 | 79 | 0.32 |
| **Auburn Division Totals*** | | **$48,023,287** | **75** | **18** | **7** | **+11.7** | **60,206** | **$ 67** | **1.32** |

*Excludes sales for Adak, AK; data for this store are included in Navy's overseas sales.

N/A = Not applicable; new store opened 9/83.

### Corpus Christi Region

| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| Beeville, TX | 2 | $ 2,061,278 | 75 | 18 | 7 | +13.1 | 5,464 | 31 | 0.06 |
| Corpus Christi, TX | 4 | 7,281,807 | 74 | 19 | 7 | +9.3 | 14,024 | 43 | 0.20 |
| Kingsville, TX | 2 | 1,889,560 | 76 | 18 | 6 | +14.2 | 6,700 | 24 | 0.05 |
| **Corpus Christi Region Totals** | | **$11,232,645** | **75** | **18** | **7** | **+10.8** | **26,188** | **$ 36** | **0.31** |

### Davisville Division

| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| Brunswick, ME | 4 | $ 7,013,874 | 77 | 17 | 6 | +9.7 | 11,662 | 50 | 0.19 |
| Cutler, ME | 1 | 607,736 | 75 | 19 | 6 | +19.2 | 2,252 | 22 | 0.02 |
| New London, CT | 7 | 22,801,507 | 75 | 18 | 7 | +14.4 | 21,685 | 88 | 0.63 |
| Newport, RI | 5 | 12,453,547 | 73 | 20 | 7 | +12.1 | 14,346 | 72 | 0.34 |
| Scotia, NY | 2 | 3,062,208 | 74 | 21 | 5 | +13.4 | 8,200 | 31 | 0.08 |
| Winter Harbor, ME | 1 | 718,240 | 78 | 16 | 6 | +17.1 | 1,876 | 32 | 0.02 |
| **Davisville Division Totals** | | **$46,657,112** | **75** | **18** | **7** | **+13.1** | **60,021** | **$65** | **1.29** |

**Notes:** Sales data in this special *Interservice* report exclude the 5 percent commissary surcharge.

Sales classifications for Navy commissaries are based upon total average monthly sales, as follows:

| | | | |
|---|---|---|---|
| Class 1 Up to $100,000 | Class 3 $300,001-$500,000 | Class 5 $750,001-$1,000,000 | Class 7 $1,500,001-$2,000,000 |
| Class 2 $100,001-$300,000 | Class 4 $500,001-$750,000 | Class 6 $1,000,001-$1,500,000 | Class 8 Over $2,000,000 |

The ACV (All Commodity Volume) analysis shows each individual commissary or regional area FY84 sales total as a percentage of separately combined CONUS and overseas sales of all Army, Air Force, Marine Corps and Navy commissaries. Sales at commissaries in Alaska, Hawaii, Puerto Rico and other locations not contiguous with the 48 continental United States are classed and reported "Overseas." The ACV given for "Worldwide Totals" represents the percent sales share of commissaries operated by that service branch against the FY84 worldwide sales reported for *all* service branches.

### Navy Commissary Coupon Redemptions — FY84

| | Number | % Share Worldwide | $ Value | % Share Worldwide |
|---|---|---|---|---|
| CONUS | 27,959,492 | 98.5 | 7,190,556 | 98.5 |
| Overseas | 436,604 | 1.5 | 110,899 | 1.5 |
| **Worldwide Totals** | **28,396,096** | **100.0%** | **$7,301,455** | **100.0%** |

# Navy Commissary Sales — FY84

## Navy Commissary Regional Rankings by ACV CONUS and Overseas. . .based on FY84 sales

**Note:** Totals may not add due to rounding.

### CONUS

| Rank | Regional Group | ACV |
|---|---|---|
| 1 | San Diego Group | 3.92 |
| 2 | Norfolk Group | 2.73 |
| 3 | Jacksonville Group | 2.57 |
| 4 | Oakland Division | 2.21 |
| 5 | Pensacola Region | 1.66 |
| 6 | Auburn Division | 1.32 |
| 7 | Davisville Division | 1.29 |
| 8 | Patuxent River Region | 0.97 |
| 9 | Great Lakes Region | 0.44 |
| 10 | Corpus Christi Region | 0.31 |
| **Total Navy CONUS ACV** | | **17.41** |

### Overseas

| Rank | Regional Group | ACV |
|---|---|---|
| * | *(See Note)* | 4.90 |
| 1 | Pearl Harbor Region | 6.07 |
| 2 | Yokosuka Region | 1.21 |
| 3 | Naples Region | 1.20 |
| 4 | Subic Bay Region | 1.12 |
| 5 | United Kingdom Region | 0.56 |
| **Total Navy Overseas ACV** | | **15.05** |

*The ACV data for 10 stand-alone overseas Navy Commissaries are combined and reported in this table so that the ACV total for all Navy commissaries overseas approximates the true Navy ACV share total for overall, all-service, overseas store activity.

## It's A Fact!

Do you know how many military commissary stores were in operation worldwide in FY84? The answer is 374 (excluding Army's 39 grocery annexes).

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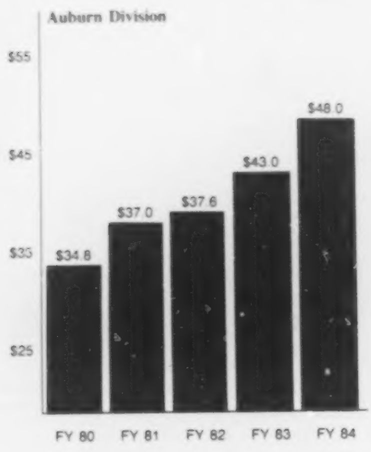
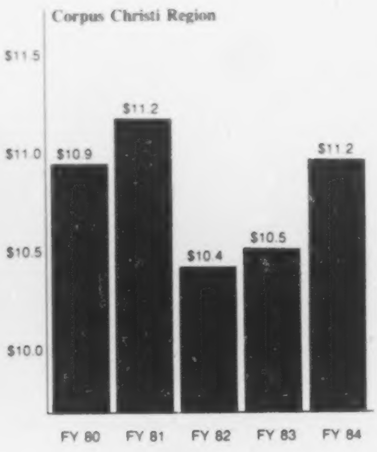
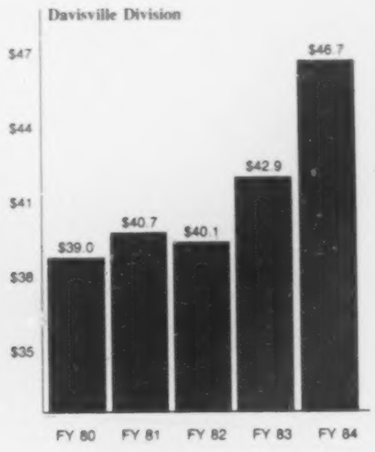
# Navy Commissary Sales — FY84

5-Year Total Sales Summary – (NAVRESSO)/$ Millions





5-Year Total Sales Summary – (NAVRESSO)/$ Millions



## Navy Commissary Store Rankings by ACV CONUS and Overseas . . . based on FY84 sales

The ACV (All Commodity Volume) rankings are provided as a sales and marketing management tool for companies who wish to identify marketing opportunities with accurate sales performance data. The ACV for each CONUS and overseas Army commissary is calculated by dividing the sales totals for *all* CONUS or overseas commissaries of *all* service branches into that individual store's sales total. The overseas ACV for Pearl Harbor, HI, for example, indicates that 5.12 percent of *all* overseas commissaries' sales, regardless of their service branch affiliation, were generated at Pearl Harbor. Excluded from all sales data in this *Interservice* report are FY84 sales at Coast Guard's two commissaries, one in CONUS (Governors Island, NY) and one overseas (Kodiak, AK), because official data is not available.

### CONUS

| Rank | Store | ACV |
|---|---|---|
| 1 | Miramar, CA | 1.10 |
| 2 | Little Creek, VA | 1.04 |
| 3 | San Diego NS, CA | 0.98 |
| 4 | Oceana, VA | 0.77 |
| 5 | Jacksonville, FL | 0.75 |
| 6 | Moffett Field, CA | 0.72 |
| 7 | New London, CT | 0.63 |
| 8 | Long Beach, CA | 0.61 |
| 9 | Orlando, FL | 0.60 |
| 10 | Pensacola, FL | 0.58 |
| 11 | Norfolk, VA | 0.49 |
| 12 | Alameda, CA | 0.47 |
| 13 | Seattle, WA | 0.47 |
| 14 | Memphis, TN | 0.45 |
| 15 | Great Lakes, IL | 0.42 |
| 16 | North Island, CA | 0.40 |
| 17 | Port Hueneme, CA | 0.38 |
| 18 | Portsmouth, VA | 0.36 |
| 19 | Newport, RI | 0.34 |
| 20 | Whidbey Island, WA | 0.32 |
| 21 | Mayport, FL | 0.30 |
| 22 | Mare Island, CA | 0.29 |
| 23 | Bangor, WA | 0.29 |
| 24 | New Orleans, LA | 0.27 |
| 25 | Charleston NS, SC | 0.27 |
| 26 | Charleston NWS, SC | 0.27 |
| 27 | Novato (Hamilton), CA | 0.26 |
| 28 | San Diego NTC, CA | 0.26 |
| 29 | Philadelphia, PA | 0.25 |
| 30 | Bremerton, WA | 0.25 |
| 31 | Annapolis, MD | 0.23 |
| 32 | Lemoore, CA | 0.22 |
| 33 | Mitchel Field, NY | 0.20 |
| 34 | Corpus Christi, TX | 0.20 |
| 35 | Brunswick, ME | 0.19 |
| 36 | Patuxent, MD | 0.19 |
| 37 | Cecil Field, FL | 0.18 |
| 38 | Gulfport, MS | 0.13 |
| 39 | Key West, FL | 0.13 |
| 40 | Meridian, MS | 0.11 |
| 41 | Treasure Island, CA | 0.11 |
| 42 | Whiting Field, FL | 0.11 |
| 43 | Point Mugu, CA | 0.10 |
| 44 | Stockton, CA | 0.09 |
| 45 | Scotia, NY | 0.08 |
| 46 | Yorktown, VA | 0.08 |
| 47 | China Lake, CA | 0.07 |
| 48 | Lakehurst, NJ | 0.07 |
| 49 | Athens, GA | 0.06 |
| 50 | Beeville, TX | 0.06 |
| 51 | Kingsville, TX | 0.05 |
| 52 | Fallon, NV | 0.05 |
| 53 | Dahlgren, VA | 0.03 |
| 54 | El Centro, CA | 0.03 |
| 55 | Winter Harbor, ME | 0.02 |
| 56 | Cutler, ME | 0.02 |
| 57 | Crane, IL | 0.01 |

### Overseas

| Rank | Store | ACV |
|---|---|---|
| 1 | Pearl Harbor, HI | 5.12 |
| 2 | Guam | 1.74 |
| 3 | Subic Bay, PI | 0.99 |
| 4 | Yokosuka, Japan | 0.90 |
| 5 | Barbers Point, HI | 0.86 |
| 6 | Roosevelt Roads, PR | 0.79 |
| 7 | Naples, Italy | 0.76 |
| 8 | Rota, Spain | 0.58 |
| 9 | Guantanamo Bay, Cuba | 0.49 |
| 10 | Holy Loch, Scotland | 0.44 |
| 11 | Bermuda | 0.38 |
| 12 | Keflavik, Iceland | 0.38 |
| 13 | Adak, AK | 0.36 |
| 14 | Sigonella, Italy | 0.34 |
| 15 | Atsugi, Japan | 0.23 |
| 16 | San Miguel, PI | 0.12 |
| 17 | Edzell, Scotland | 0.11 |
| 18 | La Maddalena, Italy | 0.10 |
| 19 | Lualualei, HI | 0.09 |
| 20 | Sasebo, Japan | 0.08 |
| 21 | Argentia, Newfoundland | 0.07 |
| 22 | Exmouth, Australia | 0.06 |
| 23 | Chinhae, Korea | 0.05 |

# Navy Commissary Sales — FY84

## Great Lakes Region

| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| Crane, IN | 1 | $ 541,188 | 78 | 19 | 3 | +7.2 | 2,650 | 17 | 0.01 |
| Great Lakes, IL | 6 | 15,269,344 | 75 | 19 | 6 | +10.6 | 18,700 | 68 | 0.42 |
| **Great Lakes Region Totals** | | **$15,810,532** | **75** | **19** | **6** | **+10.5** | **21,350** | **$62** | **0.44** |

**Notes:** Sales data in this special *Interservice* report exclude the 5 percent commissary surcharge.

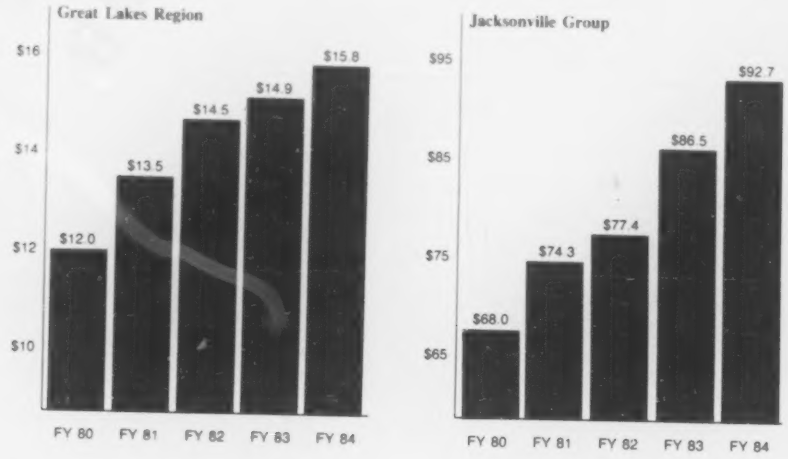
The ACV (All Commodity Volume) analysis shows each individual commissary or regional area FY84 sales total as a percentage of separately combined CONUS and overseas sales of all Army, Air Force, Marine Corps and Navy commissaries. Sales at commissaries in Alaska, Hawaii, Puerto Rico and other locations not contiguous with the 48 continental United States are classed and reported "Overseas." The ACV given for "Worldwide Totals" represents the percent sales share of commissaries operated by that service branch against the FY84 worldwide sales reported for *all* service branches.

## It's A Fact!

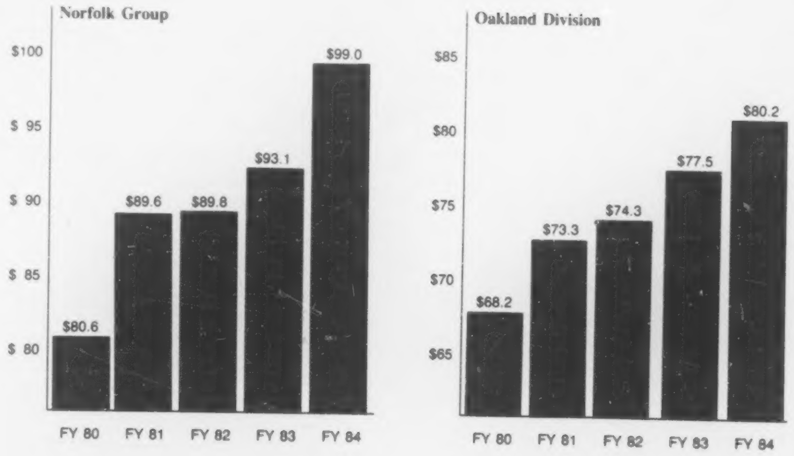
Do you know which are the 20 *CONUS* military commissaries reporting the highest FY84 total store sales?

1. MacDill AFB, FL (*$53,052,964*)
2. Ft. Hood, TX (*$51,849,780*)
3. Ft. Bragg, NC (*$51,356,606*)
4. Ft. Bliss, TX (*$50,506,919*)
5. Ft. Belvoir, VA (*$48,146,710*)
6. McChord AFB, WA (*$46,431,307*)
7. McGuire AFB, NJ (*$44,721,034*)
8. Carswell AFB, TX (*$42,655,321*)
9. Ft. Lewis, WA (*$41,518,103*)
10. Wright-Patterson AFB, OH (*$41,376,644*)
11. Miramar, CA (*$39,796,754*)
12. Ft. Benning, GA (*$38,282,191*)
13. Randolph AFB, TX (*$38,126,801*)
14. Little Creek, VA (*$37,610,537*)
15. Andrews AFB, MD (*$37,070,553*)
16. Barksdale AFB, LA (*$36,706,238*)
17. Tinker AFB, OK (*$36,282,836*)
18. Langley AFB, VA (*$36,157,825*)
19. San Diego NS, CA (*$35,562,498*)
20. Ft. Ord, CA (*$35,434,257*)

5-Year Total Sales Summary—(NAVRESSO)/$ Millions



5-Year Total Sales Summary—(NAVRESSO)/$ Millions



# Navy Commissary Sales — FY84

## Jacksonville Group

| Store | Store Class | Total Store $ Sales | % of Store Total: Grocery | Meat | Produce | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| Athens, GA | 2 | $ 2,322,540 | 75 | 18 | 7 | +8.0 | 4,400 | 44 | 0.06 |
| Cecil Field, FL | 3 | 6,580,869 | 72 | 23 | 5 | +16.2 | 10,226 | 54 | 0.18 |
| Charleston NS, SC | 4 | 9,810,963 | 79 | 15 | 6 | +25.1 | 25,727 | 32 | 0.27 |
| Charleston NWS, SC | 5 | 9,623,835 | 80 | 15 | 5 | +24.4 | 10,540 | 76 | 0.27 |
| Jacksonville, FL | 8 | 27,065,719 | 75 | 19 | 6 | +5.8 | 19,728 | 114 | 0.75 |
| Key West, FL | 3 | 4,549,848 | 74 | 19 | 7 | +11.5 | 9,139 | 41 | 0.13 |
| Mayport, FL | 5 | 10,963,033 | 74 | 20 | 6 | +7.0 | 11,700 | 78 | 0.30 |
| Orlando, FL | 7 | 21,745,376 | 72 | 21 | 7 | +4.8 | 30,155 | 60 | 0.60 |
| **Jacksonville Group Totals** | | **$92,662,183** | **75** | **19** | **6** | **+10.3** | **121,615** | **$ 63** | **2.57** |

## Norfolk Group

| Store | Store Class | Total Store $ Sales | % of Store Total: Grocery | Meat | Produce | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| Little Creek, VA | 8 | $37,610,537 | 75 | 18 | 7 | +14.2 | 35,912 | 87 | 1.04 |
| Norfolk, VA | 6 | 17,588,203 | 77 | 17 | 6 | +4.6 | 25,711 | 57 | 0.49 |
| Oceana, VA | 8 | 27,892,305 | 76 | 18 | 6 | +9.8 | 23,839 | 98 | 0.77 |
| Portsmouth, VA | 6 | 12,992,051 | 76 | 18 | 6 | +7.7 | 21,346 | 51 | 0.36 |
| Yorktown, VA | 2 | 2,877,743 | 72 | 22 | 6 | +16.1 | 7,056 | 34 | 0.08 |
| **Norfolk Group Totals** | | **$98,960,839** | **76** | **18** | **6** | **+10.3** | **113,864** | **$72** | **2.73** |

## Oakland Division

| Store | Store Class | Total Store $ Sales | % of Store Total: Grocery | Meat | Produce | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| Alameda, CA | 6 | $17,096,682 | 74 | 20 | 6 | +5.2 | 22,835 | 62 | 0.47 |
| Fallon, NV | 2 | 1,731,507 | 80 | 17 | 3 | +12.8 | 4,000 | 36 | 0.05 |
| Lemoore, CA | 4 | 8,085,331 | 80 | 16 | 4 | +17.8 | 16,870 | 40 | 0.22 |
| Mare Island, CA | 5 | 10,613,120 | 74 | 19 | 7 | +7.5 | 16,840 | 53 | 0.29 |
| Moffett Field, CA | 8 | 26,082,013 | 73 | 21 | 6 | +7.6 | 18,280 | 119 | 0.72 |
| Novato (Hamilton), CA | 5 | 9,363,158 | 74 | 19 | 7 | +7.4 | 19,500 | 40 | 0.26 |
| Stockton, CA | 2 | 3,373,404 | 78 | 18 | 4 | +11.7 | 7,422 | 38 | 0.09 |
| Treasure Island, CA | 3 | 3,894,522 | 74 | 20 | 6 | +5.2 | 9,696 | 33 | 0.11 |
| **Oakland Division Totals** | | **$80,239,737** | **75** | **20** | **5** | **+8.1** | **115,443** | **$ 58** | **2.21** |

**Notes:** Sales data in this special *Interservice* report exclude the 5 percent commissary surcharge.

The ACV (All Commodity Volume) analysis shows each individual commissary or regional area FY84 sales total as a percentage of separately combined CONUS and overseas sales of all Army, Air Force, Marine Corps and Navy commissaries. Sales at commissaries in Alaska, Hawaii, Puerto Rico and other locations not contiguous with the 48 continental United States are classed and reported "Overseas." The ACV given for "Worldwide Totals" represents the percent sales share of commissaries operated by that service branch against the FY84 worldwide sales reported for *all* service branches.

# Navy Commissary Sales — FY84

## Patuxent River Region

| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| Annapolis, MD | 4 | $ 8,409,010 | 72 | 21 | 7 | +11.1 | 13,374 | 52 | 0.23 |
| Dahlgren, VA | 1 | 970,527 | 75 | 19 | 6 | +21.0 | 4,593 | 18 | 0.03 |
| Lakehurst, NJ | 2 | 2,570,056 | 72 | 21 | 7 | +15.7 | 5,075 | 42 | 0.07 |
| Mitchel Field, NY | 4 | 7,302,880 | 73 | 20 | 7 | +5.2 | 13,279 | 46 | 0.20 |
| Patuxent, MD | 4 | 6,757,091 | 77 | 17 | 6 | +13.8 | 9,406 | 60 | 0.19 |
| Philadelphia, PA | 4 | 9,057,939 | 72 | 21 | 7 | +10.9 | 18,075 | 42 | 0.25 |
| **Patuxent River Region Totals** | | **$35,067,503** | **73** | **20** | **7** | **+10.8** | **63,802** | **$46** | **0.97** |

## Pensacola Region

| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| Gulfport, MS | 3 | $ 4,576,065 | 76 | 18 | 6 | +15.1 | 10,076 | 38 | 0.13 |
| Memphis, TN | 6 | 16,440,612 | 77 | 18 | 5 | +9.7 | 17,600 | 78 | 0.45 |
| Meridian, MS | 5 | 4,182,109 | 76 | 19 | 5 | +3.7 | 8,702 | 40 | 0.11 |
| New Orleans, LA | 3 | 9,832,917 | 75 | 19 | 6 | +6.1 | 15,458 | 53 | 0.27 |
| Pensacola, FL | 6 | 21,196,253 | 74 | 19 | 7 | +25.1 | 22,720 | 78 | 0.58 |
| Whiting Field, FL | 3 | 3,826,912 | 75 | 19 | 6 | +7.2 | 7,870 | 41 | 0.11 |
| **Pensacola Region Totals** | | **$60,054,868** | **75** | **19** | **6** | **+13.8** | **82,426** | **$61** | **1.66** |

## San Diego Group

| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| China Lake, CA | 2 | $ 2,621,300 | 75 | 19 | 6 | +6.0 | 3,927 | 56 | 0.07 |
| El Centro, CA | 1 | 935,121 | 73 | 20 | 7 | +6.9 | 2,720 | 29 | 0.03 |
| Long Beach, CA | 7 | 22,238,402 | 71 | 23 | 6 | −2.1 | 26,800 | 69 | 0.61 |
| Miramar, CA | 8 | 39,796,754 | 75 | 19 | 6 | +26.8 | 38,600 | 86 | 1.10 |
| North Island, CA | 6 | 14,606,519 | 74 | 20 | 6 | +7.4 | 14,415 | 84 | 0.40 |
| Port Hueneme, CA | 6 | 13,686,259 | 73 | 21 | 6 | +5.2 | 16,700 | 68 | 0.38 |
| Point Mugu, CA | 3 | 3,552,185 | 76 | 18 | 6 | +0.9 | 17,520 | 39 | 0.10 |
| San Diego NS, CA | 8 | 35,562,498 | 76 | 19 | 5 | −0.4 | 32,590 | 91 | 0.98 |
| San Diego NTC, CA | 5 | 9,276,380 | 77 | 16 | 7 | −8.7 | 13,238 | 58 | 0.26 |
| **San Diego Group Totals** | | **$142,275,418** | **74** | **20** | **6** | **+6.6** | **156,510** | **$76** | **3.92** |

## Totals

| | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|
| | | Grocery | Meat | Produce | | | | |
| **CONUS Totals** | **$630,984,124** | **75%** | **19%** | **6%** | **+6.3%** | **821,425** | **$ 64** | **17.41%** |

**Notes:** Sales data in this special *Interservice* report exclude the 5 percent commissary surcharge.

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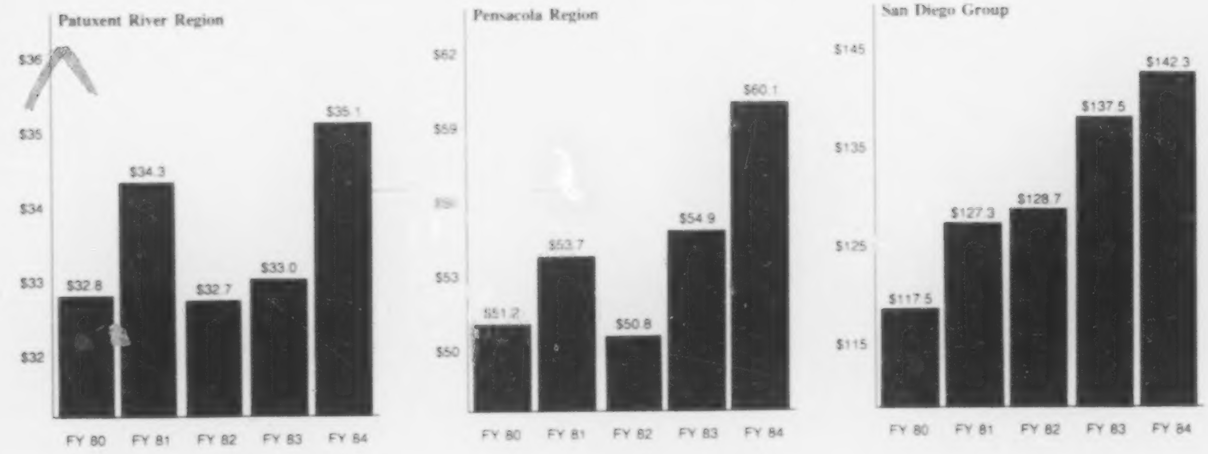
# Navy Commissary Sales — FY84

5-Year Total Sales Summary – (NAVRESSO)/$ Millions



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# Navy Commissary Sales — FY84

## Analysis of Sales by Store & Region/Group/Division (Overseas)

### Naples Region

| Store | Store Class | Total Store $ Sales | % of Store Total Grocery | % of Store Total Meat | % of Store Total Produce | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| La Maddalena | 1 | $ 949,888 | 96 | 4 | – | +0.7 | 1,500 | 53 | 0.10 |
| Naples | 4 | 7,194,161 | 83 | 13 | 4 | +4.7 | 6,804 | 88 | 0.76 |
| Sigonella | 2 | 3,213,419 | 80 | 16 | 4 | +15.0 | 5,775 | 46 | 0.34 |
| **Naples Region Totals** | | **$11,357,468** | **83** | **13** | **4** | **+7.0** | **14,079** | **$67** | **1.20** |

### Pearl Harbor Region

| Store | Store Class | Total Store $ Sales | % of Store Total Grocery | % of Store Total Meat | % of Store Total Produce | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| Barbers Point, HI | 4 | $ 8,136,648 | 72 | 20 | 8 | +5.0 | 9,660 | 70 | 0.86 |
| Lualualei, HI | 1 | 897,168 | 78 | 17 | 5 | +7.6 | 4,009 | 19 | 0.09 |
| Pearl Harbor, HI | 8 | 48,615,893 | 75 | 18 | 7 | +32.6 | 24,641 | 164 | 5.12 |
| **Pearl Harbor Region Totals** | | **$57,649,709** | **75** | **18** | **7** | **+27.4** | **38,310** | **$125** | **6.07** |

### Subic Bay Region

| Store | Store Class | Total Store $ Sales | % of Store Total Grocery | % of Store Total Meat | % of Store Total Produce | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| San Miguel, PI | 1 | $ 1,163,968 | 76 | 18 | 6 | +7.6 | 2,514 | 39 | 0.12 |
| Subic Bay, PI | 5 | 9,446,409 | 78 | 15 | 7 | +2.0 | 7,032 | 112 | 0.99 |
| **Subic Bay Region Totals** | | **$10,610,377** | **77** | **15** | **8** | **+2.6** | **9,546** | **$ 93** | **1.12** |

**Notes:** Sales data in this special *Interservice* report exclude the 5 percent commissary surcharge.

Sales classifications for Navy commissaries are based upon total average monthly sales, as follows:
Class 1 Up to $100,000
Class 2 $100,001-$300,000
Class 3 $300,001-$500,000
Class 4 $500,001-$750,000
Class 5 $750,001-$1,000,000
Class 6 $1,000,001-$1,500,000
Class 7 $1,500,001-$2,000,000
Class 8 Over $2,000,000

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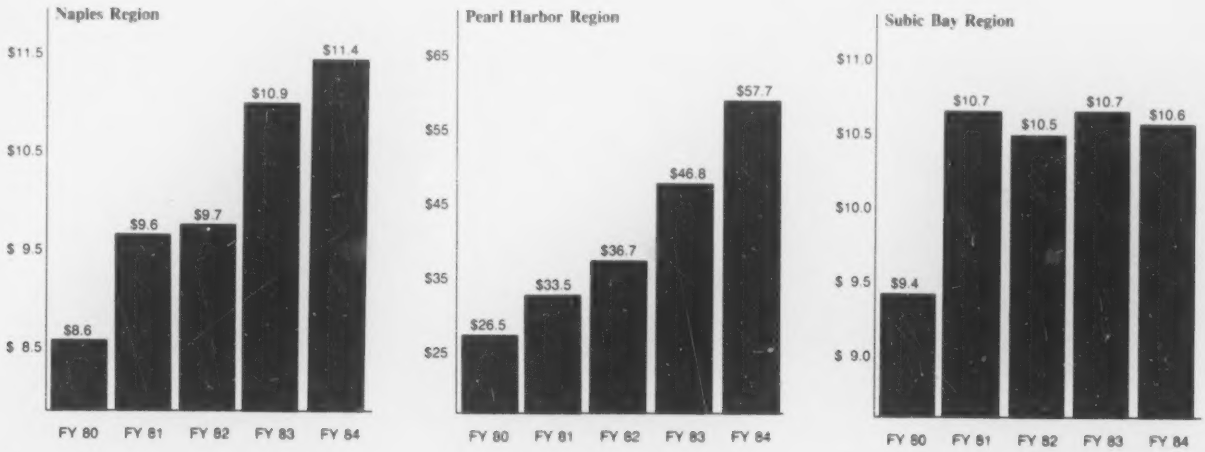
5-Year Total Sales Summary – (NAVRESSO)/$ Millions



# Navy Commissary Sales — FY84

## United Kingdom Region

| Store | Store Class | Total Store $ Sales | % of Store Total Grocery | Meat | Produce | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| Edzell, Scotland | 1 | $1,083,233 | 81 | 13 | 6 | +0.6 | 3,474 | 26 | 0.11 |
| Holy Loch, Scotland | 3 | 4,228,461 | 89 | 9 | 2 | +1.9 | 4,841 | 73 | 0.44 |
| **United Kingdom Region Totals** | | **$5,311,694** | **87** | **9** | **4** | **+1.6** | **8,315** | **$53** | **0.56** |

## Yokosuka Region

| Store | Store Class | Total Store $ Sales | % of Store Total Grocery | Meat | Produce | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| Atsugi, Japan | 2 | $ 2,179,307 | 82 | 13 | 5 | +9.7 | 6,326 | 29 | 0.23 |
| Sasebo, Japan | 1 | 730,058 | 81 | 15 | 4 | +25.6 | 3,208 | 19 | 0.08 |
| Yokosuka, Japan | 4 | 8,590,427 | 75 | 17 | 8 | +8.4 | 14,600 | 49 | 0.90 |
| **Yokosuka Region Totals** | | **$11,499,792** | **77** | **16** | **7** | **+9.6** | **24,134** | **$40** | **1.21** |

**Notes:** Sales data in this special *Interservice* report exclude the 5 percent commissary surcharge.

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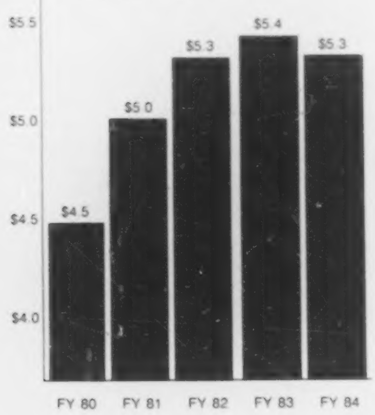
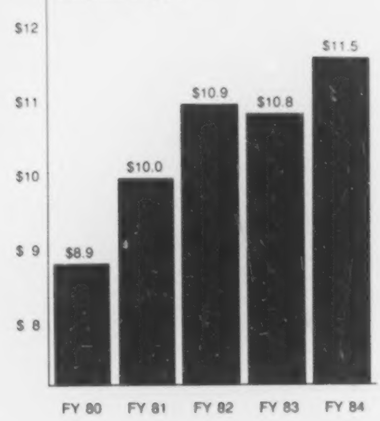
5-Year Total Sales Summary—(NAVRESSO)/$ Millions

United Kingdom Region



Yokosuka Region



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# Navy Commissary Sales — FY84

## Stand-Alone Stores

| Store | Store Class | Total Store $ Sales | % of Store Total: Grocery | Meat | Produce | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|---|
| Adak, AK | 2 | $ 3,398,029 | 78 | 15 | 7 | +8.2 | 8,480 | 36 | 0.36 |
| Argentia, Newfoundland | 1 | 685,355 | 80 | 14 | 6 | +3.5 | 6,726 | 8 | 0.07 |
| Bermuda | 2 | 3,622,704 | 80 | 14 | 6 | +13.5 | 5,607 | 54 | 0.38 |
| Chinhae, Korea | 1 | 433,391 | 78 | 19 | 3 | +5.9 | 2,400 | 15 | 0.05 |
| Exmouth, Australia | 1 | 600,982 | 74 | 19 | 7 | +4.3 | 3,077 | 16 | 0.06 |
| Guam | 5 | 16,537,771 | 75 | 18 | 7 | +52.7 | 15,303 | 90 | 1.74 |
| Guantanamo Bay | 3 | 4,621,540 | 74 | 17 | 9 | +11.6 | 8,100 | 48 | 0.49 |
| Keflavik, Iceland | 3 | 3,606,901 | 78 | 16 | 6 | +1.7 | 7,784 | 39 | 0.38 |
| Roosevelt Roads, PR | 4 | 7,545,037 | 76 | 18 | 6 | +12.9 | 10,880 | 58 | 0.79 |
| Rota, Spain | 3 | 5,512,325 | 83 | 14 | 3 | −2.8 | 8,716 | 53 | 0.58 |
| **Stand-Alone Store Totals** | | **$46,564,035** | **77** | **17** | **6** | **+16.4** | **77,073** | **$50** | **4.90** |

## Totals

| | Total Store $ Sales | % of Store Total: Grocery | Meat | Produce | Total Sales % Change vs. FY 83 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV Analysis |
|---|---|---|---|---|---|---|---|---|
| **Overseas Totals** | **$142,993,075** | **77%** | **16%** | **7%** | **+14.8%** | **171,459** | **$ 69** | **15.05%** |
| **Worldwide Totals** | **$773,977,199** | **75%** | **19%** | **6%** | **+11.6%** | **992,882** | **$ 65** | **16.92%** |

**Notes:** Sales data in this special *Interservice* report exclude the 5 percent commissary surcharge.

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## Navy Commissary Store Rankings by Average Monthly $ Sales/Square Foot . . . based on FY84 sales

*Overseas stores are in italics.*

| Rank | Store | Avg. Mo. $ Sales/ Sq. Ft. |
|---|---|---|
| *1* | *Pearl Harbor, HI* | *164* |
| 2 | Moffett Field, CA | 119 |
| 3 | Jacksonville, FL | 114 |
| *4* | *Subic Bay, Philippines* | *112* |
| 5 | Seattle, WA | 105 |
| 6 | Oceana, VA | 98 |
| 7 | San Diego NS, CA | 91 |
| *8* | *Guam* | *90* |
| *9* | *Naples, Italy* | *88* |
| 10 | New London, CT | 88 |
| 11 | Little Creek, VA | 87 |
| 12 | Miramar, CA | 86 |
| 13 | North Island, CA | 84 |
| 14 | Whidbey Island, WA | 79 |
| 15 | Mayport, FL | 78 |
| 16 | Memphis, TN | 78 |
| 17 | Pensacola, FL | 78 |
| 18 | Charleston NWS, SC | 76 |
| *19* | *Holy Loch, Scotland* | *73* |
| 20 | Newport, RI | 72 |
| *21* | *Barbers Point, HI* | *70* |
| 22 | Great Lakes, IL | 68 |
| 23 | Long Beach, CA | 68 |
| 24 | Port Hueneme, CA | 68 |
| 25 | Alameda, CA | 62 |
| 26 | Bremerton, WA | 61 |
| 27 | Orlando, FL | 60 |
| 28 | Patuxent, MD | 60 |
| *29* | *Roosevelt Roads, PR* | *58* |
| 30 | San Diego NTC, CA | 58 |
| 31 | Norfolk, VA | 57 |
| 32 | China Lake, CA | 56 |
| *33* | *Bermuda* | *54* |
| 34 | Cecil Field, FL | 54 |
| *35* | *La Maddelena, Italy* | *53* |
| 36 | Mare Island, CA | 53 |
| 37 | New Orleans, LA | 53 |
| *38* | *Rota, Spain* | *53* |
| 39 | Annapolis, MD | 52 |
| 40 | Portsmouth, VA | 51 |
| 41 | Brunswick, ME | 50 |
| *42* | *Yokosuka, Japan* | *49* |
| *43* | *Guantanamo Bay, Cuba* | *48* |
| 44 | Mitchel Field, NY | 46 |
| *45* | *Sigonella, Italy* | *46* |
| 46 | Athens, GA | 44 |
| 47 | Corpus Christi, TX | 43 |
| 48 | Lakehurst, NJ | 42 |
| 49 | Philadelphia, PA | 42 |
| 50 | Key West, FL | 41 |
| 51 | Whiting Field, FL | 41 |
| 52 | Lemoore, CA | 40 |
| 53 | Meridian, MS | 40 |
| 54 | Novato (Hamilton), CA | 40 |
| 55 | Bangor, WA | 39 |
| 56 | Keflavik, Iceland | 39 |
| 57 | Point Mugu, CA | 39 |
| *58* | *San Miguel, PR* | *39* |
| 59 | Gulfport, MS | 38 |
| 60 | Stockton, CA | 38 |
| 61 | Adak, AK | 36 |
| 62 | Fallon, NV | 36 |
| 63 | Yorktown, VA | 34 |
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2. RAF Greenham Common, UK (*+55.1%*)
3. Guam (*+52.7%*)
4. Robinson Barracks, FRG (*+41.3%*)
5. Pearl Harbor, HI (*+32.6%*)
6. Ramstein AB, FRG (*+27.1%*)
7. Sasebo, Japan (*+25.6%*)
8. Ft. Wainwright, AK (*+24.9%*)
9. Grafenwoehr, FRG (*+18.9%*)
10. Zaragoza, Spain (*+17.7%*)

## It's A Fact!

Do you know how many overseas military commissary stores were in operation in FY84? The answer is 145.

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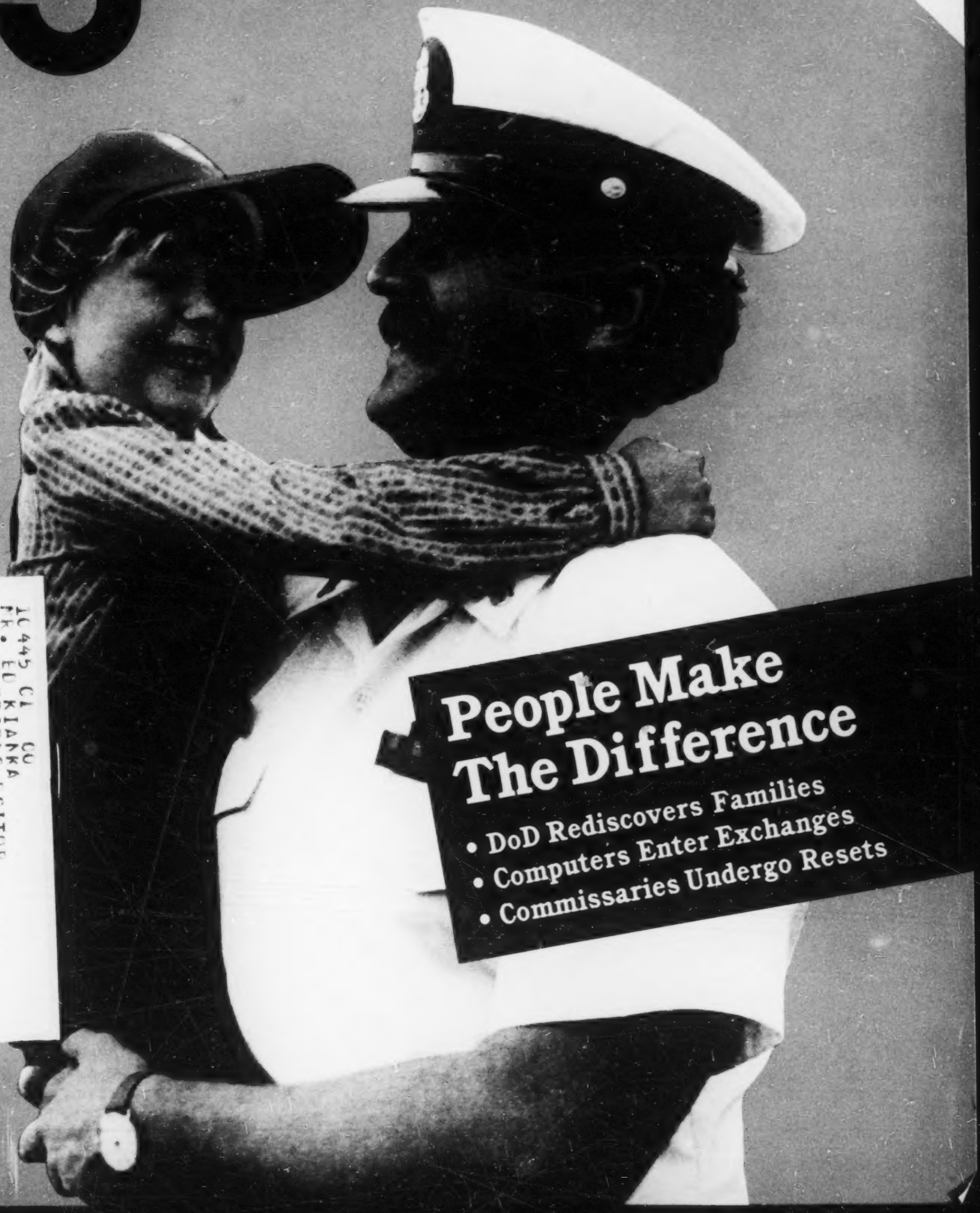

# People Make The Difference

- DoD Rediscovers Families
- Computers Enter Exchanges
- Commissaries Undergo Resets

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# Santa's Holiday Toy Box

**Military exchanges rang up some $107 million in toy sales in FY84, increasing category sales by more than ten percent over FY83.**

**Here's a glimpse at what military exchange customers will be hunting for in this coming holiday selling season.**

Coleco's Cabbage Patch Kids line won the "top licensed products" crown in 1984 for the third consecutive year. Pictured here are Cabbage Patch Twins, one of several line additions coming for 1985.
Photo courtesy Coleco Industries, Inc.

The most desired toys on Christmas lists this year are likely to be: Cabbage Patch Kids, Transformers and GoBots. Sound familiar? Those same toys led the industry to last year's record-breaking $12 billion sales performance, and toy manufacturers are eager to repeat their 1984 successes with more of the same.

"There's really not a whole lot that's new for Christmas 1985," says Frank Oliverio, a headquarters senior supervisory toy buyer for the Dallas-based Army and Air Force Exchange Service (AAFES).

"Line extensions" best describes the 1985 crop of Christmas toys, according to Barry Flayton, a headquarters toy buyer for the Staten Island, NY-based Navy Resale and Services Support Office (NAVRESSO). "If a toy did well last year, expect to see it back this year, with more items in the same line," he says.

But there's no lack of excitement about this year's selection of toys among the industry that makes them. According to Stephen G. Shank, chairman of the Toy Manufacturers of America and president of Tonka Corp., sales this year should show a healthy 15 percent increase over last year.

"Most indicators suggest a strong economy for 1985," Shank said at the American International Toy Fair in New York last February. In addition, "child demographic reports are in the toy industry's favor," he said.

"The birth rate is up 6.5 percent and about 43 percent of these are first births. The number of children under the age of five is expected to increase 7.6 percent until 1990; the number of children between the ages of five and nine should grow by 16.5 percent," he said.

## What They'll Want

What those youthful voices will be clamoring for this Christmas will be Coleco's Cabbage Patch Twins and plush little ponies for them and the other Cabbage Patch Kids to ride. New Transformers by Hasbro will be disguised as dinosaurs and radios. And there's now a triple change model that switches from a tank into a plane and then a robot, plus a train that changes into a space shuttle and robot.

The new Sectaurs line of action figures from Coleco is expected to have strong appeal. Children will find that their favorite furry insectoids double as hand puppets. Photo courtesy Coleco Industries, Inc.

Tonka has added 28 new GoBots to its line, including a giant robot that can be pieced together from six individual GoBots.

### BY MARGARET LEROUX

*Margaret LeRoux is a Chapel Hill, NC-based freelance writer. She is a regular contributor to several leading trade and business publications and has extensive writing experience in retailing subjects.*

"Collectibility is a big part of the appeal for kids' toys," says Al Carosi, vp-marketing for Hasbro Bradley. "Children like their little sets of figures, and the toy industry has responded with multiple characters."

Adds TMA's Shank, "...story lines created especially for the toy" contributed to the popularity of the industry's best selling toys last year.

Makers of action toys are following the example of Mattel's highly successful launch of He-Man and the Masters of the Universe. Introduced only four years ago, He-Man and his nemesis, Skeletor, spawned a supporting cast of best-selling characters and accessories.

Last Christmas season, Snake Mountain, the evil fortress of the arch villain Skeletor, was snatched off the shelves almost as fast as it was stocked.

"We knew Snake Mountain would be a monstrous seller," says AAFES's Oliverio. "We couldn't get enough of them to keep up with demand."

New Masters of the Universe characters this year include Roboto, a mechanical warrior with moving gears and jaw, Moss Man, master of camouflage, and Sy-Klone, a human, fist-flinging tornado.

## New For Girls

For girls who are fans of He-Man, Mattel is introducing the Princess of Power collection. The line revolves around She-Ra, the long lost sister of He-Man. Like her brother, the most powerful woman in the universe also has a dual identity, Princess Adora.

She-Ra rides a pink horse who becomes a majestic unicorn when mask and wings are added. She lives in the Crystal Castle and has a jealous adversary, Catra. She-Ra is supported by five female allies and Bow, who has a special mechanism allowing his heart to beat for her.

All these new characters "make a buyer's job much more difficult," says NAVRESSO's Flayton. "You have to weed out," he notes, those toys that will be this season's wall flowers.

The weeding-out process begins at the American International Toy Fair. This year more than 15,000 buyers from the U.S. and 60 foreign countries fought their way through packed showrooms at the Toy Center in New York.

Most fair-goers, like the buyers for AAFES and NAVRESSO, were simply window shopping. Although AAFES and NAVRESSO buyers attend the Toy Fair, decisions on what toys will be sold at most military exchanges aren't made until after the show.

## Tough Decisions

NAVRESSO's Flayton explains that Navy selection procedures involve buyers from several NAVRESSO field activities.

"We review the lines at the Toy Fair, then afterwards buyers from NAVRESSO field support offices and exchanges meet to review what we've seen and liked. We work out buying decisions together," he adds. "By the end of March, it's pretty much all settled."

Factors that go into the buyers' decisions to select a particular toy, Flayton says, include "the price, play value, educational benefits a child can derive from it, and safety factors."

"We look for the best value for the money," he says, "and determine whether the toy does what it's supposed to, be it to amuse or educate."

Adds Oliverio at AAFES, "Also important is the perceived value. Does the toy look like it's worth the price? Is the packaging attractive? Does it sell the toy?"

Among safety features considered are breakability, he says. In addition, "if a toy shoots projectiles, then we won't carry it."

As military parents increasingly price shop to stretch their budgets, military exchanges are finding themselves in heated competition with off-base discount toy outlets.

"We go out with a list of 150 to 200 toys that will be offered at prices competitive with discount stores," Flayton says. "We assign some as loss leaders," he continues, "but we can't sell every item as a loss leader."

Mattel's new Princess of Power collection will help to dramatically expand the fast-growing action figure category, and the Princess will also star in a new TV miniseries this fall. Photo Credit: © Mattel, Inc. 1985

Other difficulties for exchanges are limited amounts of sales space available for toys, and a toy selling season that essentially covers only the fourth quarter. Some exchanges sell toys throughout the year, NAVRESSO's Flayton points out, but the majority "sell toys only at the Christmas season."

At AAFES, Oliverio says that toy sales don't begin in earnest at most exchanges until mid-September, when the "Four Seasons" shops are cleared out and reset, with lawn mowers replaced by toys.

## Buying In Depth

Few exchanges are able to offer the range of toys available in chain stores like Toys R Us and Kay-Bee, Oliverio notes. "We've been successful in buying in depth, not width," he says. "We've been willing

## Toy Trivia, Anyone?

What may evolve into a trivia-type game is an entertaining list of stories describing the origins of many well-known toys and their equally renowned manufacturers, produced by the Toy Manufacturers of America. A sampling of stories are reprinted here to see how much you know about the toy industry:

■ **To Boldly Play Where No Man Has Played Before!** Luke Skywalker had R2D2; E.T. hung around with a closet full of stuffed animals. If space is the final frontier, then it's only reasonable that American astronauts are allowed to take their favorite toys on a space mission. That's exactly what happened in February 1985 when the space shuttle Challenger's crew performed weightlessness experiments with toys on their five-day flight. Hailed as the least expensive scientific experiment NASA had ever conducted, the Challenger's astronauts played with a yo-yo, top, magnetic marbles, a small red car, a back-flipping mouse and a SLINKY. The playthings reportedly cost a total of $20 and will be "co-stars" in a movie that will film the astronauts at play to educate children about zero-gravity. Check a theater near you for show times! (NASA)

■ **"Whittle" While You Work.** Herb Schaper, a Minneapolis mailman in the late 1940s, used to whittle fishing lures while walking his route and discovered that one in the shape of a flea captivated the interest of children. In 1948, with $75 in investment capital and one product, COOTIE, he started Schaper Toys. He eventually expanded and developed a line of 40 toys and games. (Schaper Manufacturing Company)

■ **Lego Bricks Have Power To Hire/Fire!** LEGO bricks were employed for an exercise used to hire potential employees at New United Motors Manufacturing Inc., (Nummi), the joint venture of General Motors and Toyota in California. In Nummi's LEGO test, one applicant told another how to assemble a truck and the latter person carried out the instructions with the building bricks. The purpose was to test how well applicants worked together and to determine creativity as well as leadership abilities. (LEGO Systems & *New York Times*, 8/23/84)

■ **Like Father Like Son.** LINCOLN LOGS were invented in 1916 by John Lloyd Wright, son of architect Frank Lloyd Wright. John got his idea for the toy while in Tokyo with his father observing construction techniques for an "earthquake-proof" hotel. Today, LINCOLN LOGS are produced from about four train carloads per month of Ponderosa pine from National Forests in Oregon. (Playskool & the U.S. Department of Agriculture)

■ **If At First You Don't Succeed.** MONOPOLY was brought to Parker Brothers in 1933 by the late Charles B. Darrow, who developed the game while he was unemployed during the Depression. It was initially rejected as having "52 fundamental errors" but was later published by the company in 1935. The most exotic versions of MONOPOLY include the all chocolate set offered a few years ago by Neiman-Marcus and Dunhill's board inlaid with semi-precious stones, 14 karat gold and ebony worth $5,000. MONOPOLY celebrated its golden anniversary in 1985 and over 90 million Monopoly sets have been sold worldwide in its first 50 years. (Parker Brothers) to buy fewer items, but at the same time offer complete lines of those items."

His strategy has apparently succeeded, as witnessed by 1984 AAFES worldwide sales of toys, hobby and craft merchandise leaping to $78.5 million, an 11.3 percent sales increase over 1983.

At NAVRESSO, Flayton reports 1984 toy sales of more than $25 million.

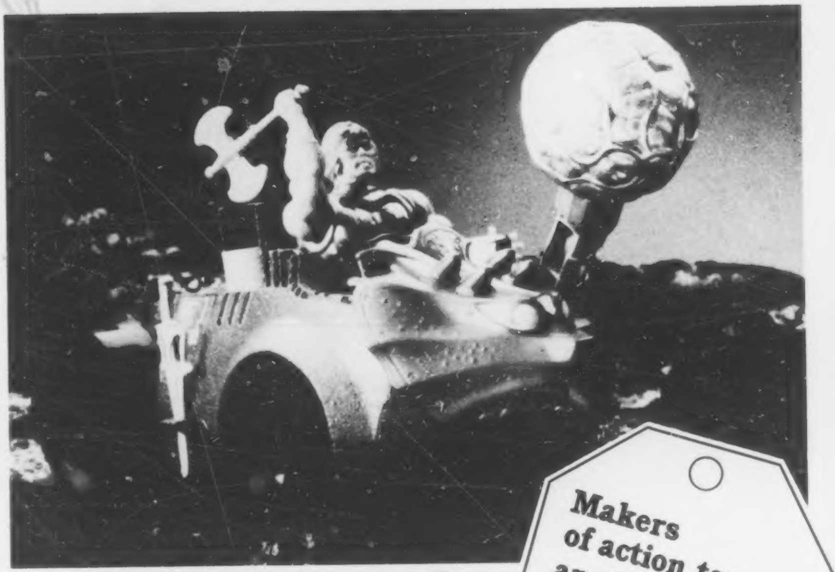
Notes Oliverio, "The trick is knowing what's going to be a hot item."

For 1985, that "hot item" may well be Wuzzles, plush figures that are a combination of two different animals. Wuzzles are a joint venture between Hasbro Bradley and Walt Disney Productions.

They have whimsical names like Hoppotomus, which is half bunny, half hippo; Bumblelion, a combination of bumblebee and lion; Eleroo, part elephant and kangaroo; and Rhinokey, part rhino and monkey.

Each Wuzzle comes with a 24-page book that tells a didactic story about each character, imparting values such as self-confidence, teamwork and sensitivity to others.

Buyers Oliverio and Flayton both predict Wuzzles to become big sellers this year and Hasbro's Carosi expects, "we'll have to struggle to keep up with the demand." The company says that advance licensing of Wuzzles property has exceeded that of any new character.



Several new action vehicles for He-Man, Skeletor, and other Masters of the Universe action figures from Mattel will adorn play area floors beginning later this year. Photo Credit: © Mattel, Inc. 1985

## TV's Toy Stars

An important part of the marketing strategy for Wuzzles will be their introduction via a weekly tv show. It's a recent trend in the toy industry to introduce new lines not only in commercials, but to feature the toys as stars of their own shows. Several new series built around new characters are scheduled to start airing in the fall.

Since He-Man and Masters of the

**Makers of action toys are following the example of Mattel's highly successful launch of He-Man and the Masters of the Universe.**

**■ Around The World And Then Some!** Long before the printed word, the toy trademarked "yo-yo" had its origin as a primitive weapon in the Philippine Islands. It was fashioned from a sharp piece of flint-like rock with a long thong tied to it. If a native's aim was poor, at least he could retrieve his weapon and the hunting expedition wouldn't be a total loss.

During the 17th and 18th centuries, the yo-yo evolved into a favorite diversion in the royal courts of France and Spain. A painting of a nobleman holding his yo-yo hangs in the Louvre in Paris.

The toy finally emigrated to the United States in the late 1920s where it officially became known as the YO-YO. Today, playing with a YO-YO is a favorite pastime around the world and a national sport in the Philippines. (Flambeau Corporation/Duncan Toys)

**■ Italian Immigrant Develops First Electric Train Set.** The late Mario Caruso, an Italian immigrant, is credited with developing the original LIONEL electric train set. It is also said that Caruso took the primitive battery-powered "box on tracks" invented by Joshua Lionel Cowan and fashioned it into a realistic model train. (Fundimensions)

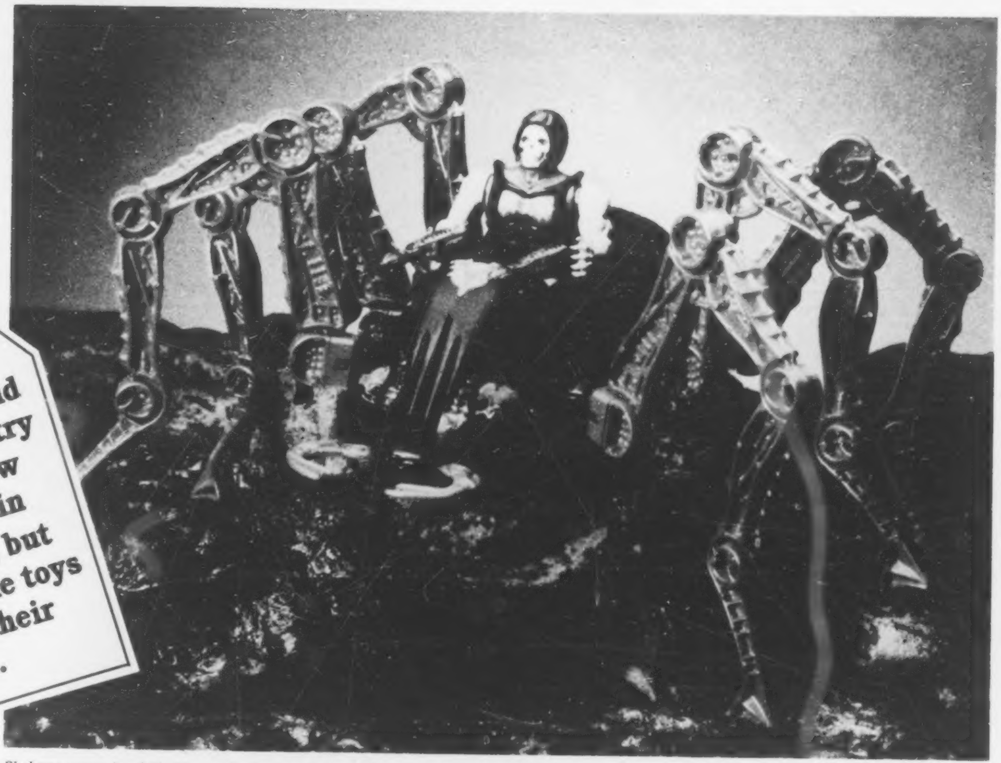
**■ The Mansion of Happiness is First American Board Game.** Invented in 1843 by a minister's daughter and published by W & S B Ives Company, the game reflected our Puritan roots. Dice were forbidden, banned as tools of the devil. The goal was for players to reach "eternal happiness." It was bought by Parker Brothers in 1880. (Parker Brothers)

**■ "Great" Little Toymaker.** Tonka, originally known as Mound Metalcraft Company, was founded in the basement of a small schoolhouse in 1946. Its first two toy trucks featured a steam shovel and a crane. The company was later named Tonka Toys after Lake Minnetonka which dominated the scenery around the company's factory. The word "tonka" means great in Sioux. Since its humble beginning with two toys, Tonka now has a line of over 100 products, including the trend-setting GOBOTS. (Tonka Corporation)

**■ Playing His Card Right.** Robert Tezak, currently the Will County, Illinois coroner, started International Games in 1972 when he bought the rights to the card game, UNO, from its late inventor Merle Robbins, a Cincinnati barber. Operating from the back room of his family's florist shop, he parlayed UNO into the best selling card game in America. Since 1972, over 45 million UNO card games have been sold worldwide. (International Games)

**■ Sudsy Start.** Kenner Products was originally a soap manufacturer trying to compete with Procter & Gamble. To induce people to use the soaps, an in-box premium, The Bubble Gun, was created. The profits from the soap went down the drain but the gun, Kenner's first toy, was extremely successful! The company's most recent successes are STAR WARS, STRAWBERRY SHORTCAKE and CARE BEARS. (Kenner Products)

**■ Step Into My Office.** In 1908, Henry S. Winzeler sold his dental practice and began a novelty items company in a rented band hall with only eight employees. That company is Ohio Art and its most famous toy is ETCH-A-SKETCH. Since its introduction in 1960, over one million ETCH-A-SKETCH toys have been sold each and every year. (Ohio Art Company)



**It's a recent trend in the toy industry to introduce new lines not only in commercials, but to feature the toys as stars of their own shows.**

Skeletor, nemesis of He-Man and other good-virtued Masters of the Universe, gets his own action vehicle to help animate action figure playtime. Photo Credit: © Mattel, Inc. 1985

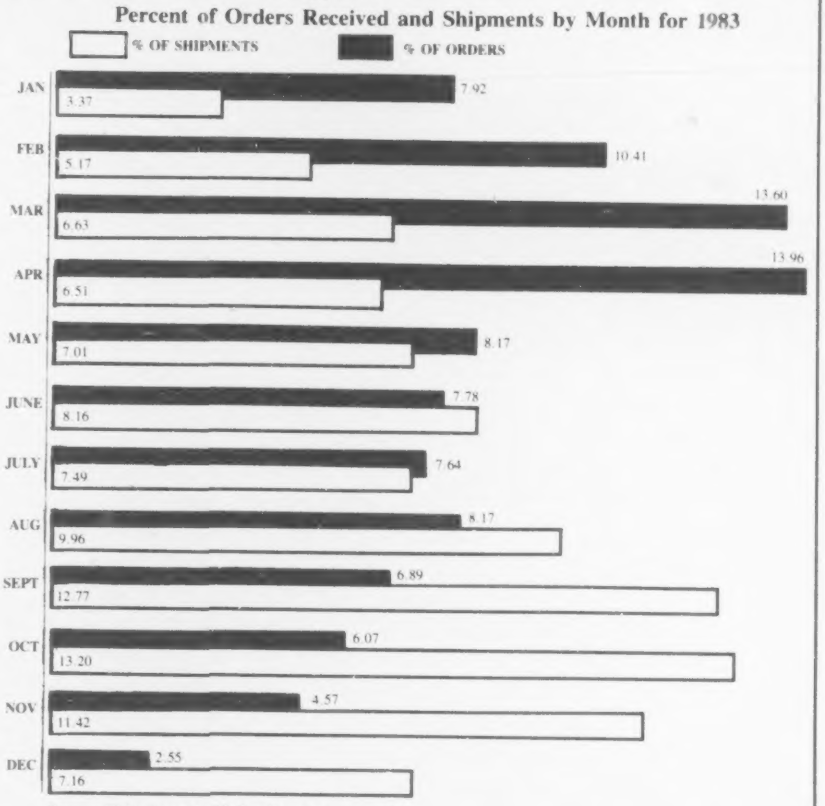
## Distribution and Consumer Purchasing Patterns

According to the Toy Manufacturers of America, because many toys are bought by the public as Christmas presents, a disproportionate amount of overall retail sales, ranging up to 60% or more, occur in one concentrated selling season in the last quarter of the year. Toy manufacturers must therefore structure their production and distribution so that a sufficient amount of product can be available in retail stores during the Christmas selling season when there is little opportunity for merchants to reorder.

Though this pattern remains essentially unchanged, there are definite indications of a developing trend toward *greater* year-round toy sales. Retailers are increasingly interested in promoting toy sales on a year-round basis and are participating with manufacturers in such efforts.

Also, inflation and fuel shortages have contributed to the growth of at-home family entertainment items such as board, card, electronic and video games. This trend has helped increase year-round sales, and also to expand the industry's consumer age base to include older teens and adults as well as children.

The 1983 pattern, month by month, of orders received and products shipped by U.S. toymakers is:



Source: TMA Monthly Market Trend Report, 1983

Universe debuted on tv three years ago, action toy shows have leaped to the top of all childrens' "must see" lists.

This fall, for example, Princess of Power will have her own show, back to back with the popular He-Man show.

Transformers were introduced last fall with a mini-series, and they'll be back this September with a daily half-hour show. GoBots are the subject of an animated series by Hanna Barbera, with 60 new episodes slated for syndication in the fall.

Two new collections of action figures, Kenner's M.A.S.K. and Coleco's Sectaurs, will soon be on tv. M.A.S.K. will be featured in a mini-series early this summer and in 65 animated half-hour episodes this fall. Sectaurs will air as a mini-series in October.

Two new entries in Kenner's plush line will debut with tv movies and mini-series. They are Hug-a-Bunch, 18-inch plush dolls dressed in satiny outfits and accompanied by their own little doll called a Huglet. Hug-a-Bunch dolls also will star in a tv movie later this year.

Robot Man, a toy that combines the appeal of a robot with the cuddly aspects of a plush toy, will be featured on a mini-series.

A new daily half-hour animated show is being planned for GI Joe this fall. A favorite on military bases since its introduction in 1964, GI Joe has undergone a streamlining that makes him a formidable competitor in the action toys category.

The original GI Joe was an 11.5-inch figure, fully articulated with 21 moving parts and life-like hair. Within five years, the GI Joe line represented every branch of the U.S. Armed Forces as well as numerous foreign armed forces.

By 1978, however, the manufacturer "wasn't sure where to go with him," says Hasbro's Carosi, "so GI Joe was furloughed." He was reintroduced in 1982 in a 3.75-inch version with a line of action figures, weapons, uniforms and vehicles modeled after modern army designs of the 1980s.

This year there will be an array of new GI Joe figures and equipment ranging from enemy Dreadnok figures to a 7.5-foot long aircraft carrier, complete with working elevator, on-board vehicles, an electronic sound mechanism, radar room, computer room and munitions armory all furnished in authentic detail. It retails for about $120.

GI Joe "does very well in the military market," says Hasbro's Carosi, "though we don't promote him as a military toy. Today, he's more of a James Bond-type character, fighting Cobra, the mythical organization that's out to destroy the world. He better fits the fantasy play/action category."

## Toy Industry Dollar[1] & Unit Shipments 1983 vs. 1984

(Estimated volumes in millions)

| | | Dollars | | | Units | | |
|---|---|---|---|---|---|---|---|
| | | 1983 | 1984 | % Change | 1983 | 1984 | % Change |
| **I.** | **Action Figures/ Dolls & Accessories** | $1,036 | $2,316 | +124% | 311 | 468 | +50% |
| | Robots | # | 220 | | # | 44 | |
| | Action Figures | 216 | 377 | | 97 | 141 | |
| | A.F. Accessories | 160 | 245 | | 26 | 29 | |
| | Baby Dolls | 160 | 512 | | 17 | 31 | |
| | Fashion Dolls | 116 | 161 | | 21 | 26 | |
| | Mini Dolls | 30* | 84 | | 10* | 19 | |
| | Other Dolls** | 131 | 265 | | 98 | 94 | |
| | Baby Doll Access. | 21 | 195 | | 3 | 25 | |
| | Fashion Doll Acess. | 65 | 94 | | 22 | 31 | |
| | Other Doll Access. | 23 | 38 | | 8 | 10 | |
| | Doll Houses/Furn. | 114 | 125 | | 9 | 18 | |
| **II.** | **Games/Puzzles (Non-Electronic)** | $514 | $1,043 | +103% | 172 | 212 | +23% |
| | Children's Board Games | 59 | 62 | | 14 | 14 | |
| | Other Board Games | 142 | 598 | | 29 | 59 | |
| | Action/Skill Games-Children | 31 | 74 | | 11 | 14 | |
| | Action/Skill Games-Adult/Family | 56 | 36 | | 5 | 4 | |
| | Card Games | 40 | 49 | | 23 | 27 | |
| | Puzzle Games | 13 | 8 | | 4 | 3 | |
| | Strategy Games | 35 | 49 | | 15 | 12 | |
| | Word Games | 26 | 29 | | 5 | 6 | |
| | Other Non-Elec. Games | 36 | 55 | | 16 | 20 | |
| | Cardboard Puzzles | 56 | 60 | | 42 | 45 | |
| | Wood/Plastic Puzzles | 20 | 23 | | 8 | 8 | |
| **III.** | **Totally Electronic Games** | $2,397 | $1,094 | −54% | 93 | 67 | −28% |
| | Electronic Learning Aids | 67 | 113 | | 4 | 6 | |
| | Elec. Hand Held/Tabletop | 170 | 51 | | 7 | 3 | |
| | TV Video Systems*** | 760 | 165 | | 7 | 3 | |
| | TV Video Software*** | 1400 | 765 | | 75 | 55 | |
| **IV.** | **Sports/Outdoor Toys** | $328 | $419 | +28% | 59 | 67 | +14% |
| | Playground Equipment | 80 | 127 | | 3 | 3 | |
| | Wading Pools | 51 | 69 | | 4* | 7 | |
| | Foam Sports Toys | 31 | 37 | | 9 | 12 | |
| | Water/Sand/Pool Toys | 26 | 38 | | 12 | 14 | |
| | Other | 140 | 148 | | 31 | 31 | |
| **V.** | **Riding Toys (Excl. Bicycles)** | $255 | $285 | +12% | 21 | 19 | −10% |
| | Plastic Tricycles | 79 | 91 | | 6 | 7 | |
| | Metal Tricycles | 34 | 26 | | 2 | 1 | |
| | Other Pedal Ride-Ons | 25 | 21 | | 2 | 1 | |
| | Riding Sports | 21 | 18 | | 6 | 6 | |
| | Other Riding Vehicles | 96 | 129 | | 5 | 4 | |
| **VI.** | **Non-Riding Transportation** | $707 | $789 | +12% | 298 | 239 | −20% |
| | Battery Operated Vehicles | 181 | 244 | | 32 | 28 | |
| | Mechanically Operated Veh. | 80 | 56 | | 18 | 14 | |
| | Elec. Car/Truck Sets | 34 | 37 | | 1 | 1 | |
| | Elec. Car/Truck Access. | 12 | 15 | | 2 | 2 | |
| | Elec. Train Sets | 31 | 41 | | [illegible] | 1 | |
| | Elec. Train Access. | 25 | 24 | | 3 | 3 | |

*Continued on page 49*

## Action Toys Mean Action

You can expect a lot of action from the action toy category this Christmas season as major toy manufacturers fight for a share of that lucrative market. More than $2 billion in action toys were shipped last year, an increase of 124 percent over 1983.

The Transformer line of robots has been expanded to include insects, dinosaurs, triple changers, and small vehicles that combine to make one large robot.

The best-selling new toy of 1984, more than 10 million Transformers were sold between their retail introduction in late May and the end of the year.

Asked to explain the popularity of Transformers, Hasbro's Carosi says, "They're a combination of things kids like to play with, and making the conversion from toy to robot is something kids can do, but not many adults do successfully. The kids love the feeling they can do it themselves."

Tonka's competing GoBots will have new accessories, including Thruster, the headquarters for the evil Renegade GoBots, and Scales, a giant race car that turns into a robot monster.

In Kenner's new M.A.S.K. line, "the concept is illusion, where ordinary vehicles convert into extraordinary fighting machines and innocent-looking men are really super-sophisticated secret agents," says product manager Justo Nunez.

M.A.S.K. stands for Mobile Armored Strike Kommand, a team whose enemy is their former leader, and his evil force, V.E.N.O.M. (Vicious Evil Network of Mayhem).

The M.A.S.K. team comes with action vehicles that have a specific function related to their character. There's a tractor rig and off-road vehicle that conceals an armed hydroplane.

Coleco's new line of action figures is Sectaurs, survivors of a genetic experiment on the planet Symbion. They share thoughts and resemblance with insectoids, which they ride to fight the evil warriors of the Dark Domain. Unlike other action toys, children can place their hands inside the insectoids to control the action figures' movement.

Dargon is the heroic defender, astride Dragonflyer, whose large iridescent wings are battery operated. But like a hand puppet, the insect's jaws and legs are controlled by the child's hand inside. Dargon's archenemy is General Spidrax, who is paired with Spiderflyer, a furry insect.

Six other Sectaur figures and their companion insectoids make up the line.

Transformers were a late retail entry in 1984, but strong sales pushed them on to become the best-selling new boys' toys of the year. New and even more unusual Transformers debut in 1985. Photo courtesy Hasbro Bradley

**There's no lack of excitement about this year's selection of toys.**

## Toy Sales Don't Play Around In Exchanges

The Army and Air Force Exchange Service (AAFES) reports a 1984 year-on sales increase of 11.3 percent for all toys, games and bicycles sold in its worldwide exchange store system. An at-a-glance picture of sales performance is shown in the following table:

| | FY83 Sales | % of All Retail Sales | FY84 Sales | % of All Retail Sales |
|---|---|---|---|---|
| **Worldwide** | $70,547,000 | 2.1 | $78,509,000 | 2.2 |
| **Domestic U.S.** | 40,650,000 | 2.0 | 43,671,000 | 2.1 |
| **Overseas** | 29,071,000 | 2.2 | 33,910,000 | 2.5 |
| **Mail Order** | 826,000 | 1.3 | 927,000 | 1.5 |

The Navy Resale and Services Support Office (NAVRESSO) also reports a healthy sales gain in the toys and wheel goods category. FY84 sales increased by 14 percent over FY83 sales, accounting for 2.3 percent of all Navy exchange worldwide retail sales. A breakdown of Navy's sales by geographic area follows:

| | FY83 Sales | % of All Retail Sales | FY84 Sales | % of All Retail Sales |
|---|---|---|---|---|
| **Worldwide** | $22,525,217 | 2.2 | $25,666,422 | 2.3 |
| **Domestic U.S.** | 14,137,090 | 2.0 | 17,161,926 | 2.2 |
| **Overseas** | 8,388,127 | 2.5 | 8,504,495 | 2.5 |

## Top Of The Dolls

In the doll category, Coleco's Cabbage Patch Kids are the leaders for the third consecutive year. Last year, sales of the Cabbage Patch Kids line exceeded $500 million, and this year there are even more additions. There's even a Cabbage Patch telephone, featuring a blonde-haired, blue-eyed Cabbage Patch Kid figure for the receiver to rest upon.

Coleco is featuring fun furs for the Kids to wear, as well as a full line of accessories for Playmates, the Cabbage Patch Kids' dolls.

Mattel's Barbie continues to reign as the queen of fashion dolls, even after 25 years on the market. This year, Day to Night Barbie is ready for any career situation, from dancer to tv news reporter. As a business executive, Barbie wears a pink suit and carries an attache case, complete with calculator and credit card. Companion Ken looks very much the Yuppie in his pin-stripe business suit.

There is a new collector series of Barbie dressed in gowns by designer Oscar de la Renta.

Interest in the games category will be maintained this year with a new Genus II edition of Trivial Pursuit. Milton Bradley is introducing Stage II, a trivia game where players answer questions while trying to guess the theme which ties them together.

One of the fastest-growing of all categories features toys for infants. The baby-boom generation is producing its own baby boomlet, with parents who tend to be older, better educated, and with more disposable income. That combination spells a potential for greater sales.

Mattel is tapping into the infant toy market with its Angel Bunny line of 14 toys, from a plush Snuggle Bunny to a Musical Entertainment Center.

Tonka is offering Pound Puppies that are washable and hypo-allergenic. Each puppy comes with a leather collar and puppy care sheet.

Hasbro's pre-school toys are being touted this year by "spokesmom" Joan Lunden, mother of two and co-host of ABC TV's Good Morning, America.

With the variety and number of toys on the market for 1985, it's no wonder the Christmas "want" lists for most kids will be record-breaking in length.

The enormity of the task of merchandising all those toys is even a bit daunting to the buyers. "You get bogged down in the details," says AAFES's Oliverio, "and the glamor of the toy market disappears." It's then, he says, "that I like to stop and think, 'Hey, I'm in the business of making kids happy.' " ■

*Continued from page 47*

| | | Dollars | | | Units | | |
|---|---|---|---|---|---|---|---|
| | | 1983 | 1984 | % Change | 1983 | 1984 | % Change |
| | Non-Powered Veh. Sets/ Access. | 70 | 78 | | 11 | 9 | |
| | Non-Powered Veh. 6" or Less | 171 | 145 | | 209 | 146 | |
| | Non-Powered Veh. Over 6" | 103 | 149 | | 21 | 25 | |
| **VII.** | **Arts/Crafts/Models** | $326 | $391 | +20% | 177 | 190 | +7% |
| | Paint Sets & Supplies | 40 | 41 | | 26 | 23 | |
| | Crayon/Chalk/Drawing Sets & Supplies | 110 | 113 | | 72 | 77 | |
| | Other Sets/Supplies | 105 | 148 | | 51 | 58 | |
| | Plastic Model Kits | 71 | 89 | | 28 | 32 | |
| **VIII.** | **Miscellaneous Activity Toys** | $247 | $275 | +11% | 130 | 132 | +2% |
| | Wipe-Off Boards/Magic Slates | 4 | 3 | | 7 | 6 | |
| | Paper Dolls | 2* | 2 | | 1* | 1 | |
| | Reusable Compounds | 17 | 21 | | 20 | 21 | |
| | Mechanical Design Toys | 20 | 18 | | 5 | 4 | |
| | Musical Toys | 59 | 51 | | 12 | 8 | |
| | Remaining Misc. Activity | 145 | 180 | | 85 | 92 | |
| **IX.** | **Role Playing Toys** | $170 | $231 | +36% | 51 | 67 | +31% |
| | Appliances-Powered/Non-Powered | 83 | 120 | | 9 | 14 | |
| | Tea Sets | 22 | 21 | | 12 | 9 | |
| | Other Household/Food Toys | 16 | 8 | | 3 | 2 | |
| | Other Role Playing Toys | 49 | 82 | | 27 | 42 | |
| **X.** | **Infant/Pre-School** | $508 | $715 | +41% | 130 | 167 | +28% |
| | Infant Toys | 162 | 208 | | 57 | 62 | |
| | Pre-School Blocks | 21 | 32 | | 6 | 8 | |
| | Pre-School Learning Toys | 30* | 46 | | 5 | 6 | |
| | Pre-School Talking/ Sound Toys | 58 | 60 | | 11 | 10 | |
| | Pre-School Tub Toys | 9 | 16 | | 6 | 12 | |
| | Pre-School Push/Pull Toys | 24 | 29 | | 7 | 6 | |
| | Pre-School Playsets | 39 | 43 | | 5 | 5 | |
| | Remaining Pre-School | 165 | 281 | | 33 | 58 | |
| **XI.** | **Remaining Miscellaneous** | $1,018 | $1,435 | +41% | 461 | 533 | +16% |
| | Toy Guns/Rifles | 54 | 64 | | 18 | 23 | |
| | Bldg. Sets/Construction Toys | 97 | 141 | | 16 | 20 | |
| | Activity Books | 73 | 77 | | 153 | 154 | |
| | Learning/Study Books | 9 | 29 | | 11 | 27 | |
| | Remaining Books | 111 | 159 | | 104 | 115 | |
| | Plush | 360* | 544 | | 112* | 125 | |
| | Audio/Visual | 239 | 332 | | 32 | 48 | |
| | Educational/Scientific Toys | 21 | 30 | | 9 | 13 | |
| | Children's Furniture | 54 | 59 | | 6 | 8 | |
| • | **TOTAL INDUSTRY** | **$7,506** | **$8,993** | +20% | **1,903** | **2,161** | +14% |
| • | **INDUSTRY EXCLUDING TV VIDEO** | **$5,346** | **$8,063** | +51% | **1,821** | **2,103** | +15% |

*Notes:*
* 1983 Figures revised from previous report
** Limited sample
*** Source: Electronic Industries Association Consumer Electronics Group (JAN 1985)
¹ First Billing Value: first price paid for an item in the U.S.
# Insufficient Data
*Volumes have been projected to reflect total industry levels.*
Source: Toy Manufacturers of America.

CANDY & SNACK FOODS MARKETING

# The Military's Munch Bunch

BY MARIE KRAKOW

*An almost endless stream of new products is combining with new merchandising techniques to strengthen the already impressive sales gains in the candy, confectionery and snack foods grocery categories.*

Every year military consumers have their candy, chips, cookies, crackers, nuts, gum, pies, pretzels, extruded snacks (like cheese curls) and granola, and eat them, too.

In fact, thanks to favorable year-to-year marketing trends in the multi-billion dollar confectionery and snack foods retail industry, estimates from *Interservice* research suggest that military patrons spend at least $450 million a year on these items, with the greatest sales volume share coming from the candy-confectionery category.

The outlook for sales in the candy-confectionery category is a positive one. "We are very optimistic about the potential for growth in the confectionery snack food category over the next five years," says James Finelli, military-government sales manager for M&M/Mars, the leading manufacturer and supplier of candy to the military.

"We see category growth of 10 percent per year industry-wide," Finelli says.

## Fine-Tuned Merchandising

For candy as well as the other snack food categories, the key difference in marketing to and merchandising in commissaries versus exchanges concerns package sizes.

In commissaries, where large families tend to make planned purchases in key shopping expeditions twice a month, multipacks of candy are the rule, as are large supermarket size bags or boxes of chips, cookies and other snacks.

Exchanges sell primarily the smaller items, such as gum and roll candy and single-serve bags and single candy bars, which are usually purchased on impulse near the front end of the store.

In commissaries, the key preferred location for candy and snack food items are the mid-store gondolas, not the front end.

"We conducted our own commissary study several years ago in Air Force commissaries to determine the best location for hard roll candy and chewing gum," notes Ken Gaynor, director of military sales for Life Savers, Inc.

"It proved that the ideal location for multipacks is in the candy section. By the time commissary shoppers get to the front of the store, their planned purchases are complete."

## Opportunities For Growth

M&M/Mars' Finelli is convinced that candy is an underdeveloped feature item in commissaries, precisely because they don't sell singles or king-size items at the front end, which he describes as "the most valuable real estate in the store."

If commissaries would merchandise singles and king-size candy bars at the front end, they could realize up to a 20 percent growth opportunity, he maintains.

**Military patrons spend at least $450 million a year on confectionery and snack food items.**

They could realize an even bigger opportunity, he believes, if they would allocate space commensurate with the sales velocity of a product by pack size and, "concentrate on the high-demand products."

"The fast sellers are continually out of stock," Finelli says. "Take Snickers Bars, for example. The brand experiences about 30% out-of-stock rates in the military due to high patron demand," he says.

Frito-Lay, the number one manufacturer and supplier of salty snack food products to the military, utilizes a system to prevent out-of-stock situations at commissary stores and large exchanges.

*Marie Krakow is a Princeton Junction, NJ-based freelance writer. She is a former business publications editor who has written widely about food and non-food retailing subjects.*

PHOTOGRAPH BY **JOHN BURWELL**

The company uses direct store delivery (DSD), the nation's largest store-door delivery system, to get its products into commissaries very early in the morning, according to Felicia Zimmerman, the company's account manager for the military.

Frito-Lay itself insures that local representatives stock the commissary shelves, and where a large outlet should begin to sell out of a product the same day, the company's delivery truck returns and restocks the store's gondolas.

## Favorable Demographics

"A great portion of our overall sales and marketing effort is placed on the military. It's a very important segment of the marketplace to us," Frito-Lay's Zimmerman comments. Many military sales managers at other snack food companies share her view.

The demographics of the military consumer are especially favorable to the market, particularly the age range. Many large military families with young children, for example, tend to shop the commissaries.

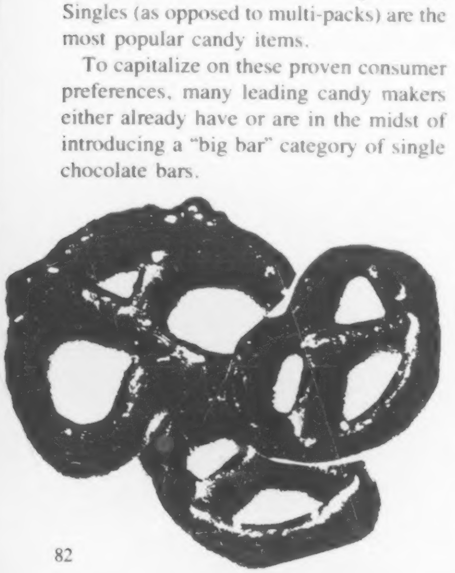
Studies have shown that the majority of all salty snack consumers are in the age group ranging up from 17 years to the mid-40s, according to Frito-Lay's Zimmerman.

"The profile of the heavy, salty snack user links up very well with the military age group profile, so there's a lot of synergy right there," she notes.

## "Big" Is New For Candy

Although candy is by far the largest-selling segment of the combined snack/candy-confectionery industry, accounting for nearly a third of total sales, chocolate is the leader within the candy category, accounting for more than 70 percent of candy sales, according to the Commerce Department. Singles (as opposed to multi-packs) are the most popular candy items.

To capitalize on these proven consumer preferences, many leading candy makers either already have or are in the midst of introducing a "big bar" category of single chocolate bars.



## Big Bars Come To Market

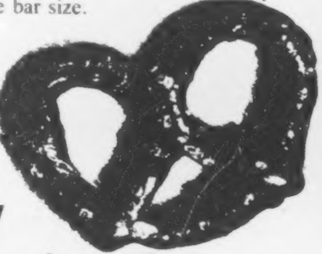
The creation of a "big bar" category for single chocolate bars and single-pack chocolate piece candy has become a key trend in the confectionery industry. Here's what some of the major manufacturers are doing to respond to consumer demand for these hot new items:

■ **Hershey Chocolate Company** – In 1984 tested Hershey Big Block, plus Golden Almond Bars, Golden Pecan Bars and Golden Almond Solitaires (chocolate covered almonds in a pouch) in three military commissary regions, where they continue to be sold.

■ **Life Savers, Inc.** – Plans to introduce a new 4 oz. ("quarter pounder") version of its popular Baby Ruth & Butterfinger candy bars in May this year. Views big bar category as a "big opportunity."

■ **M&M/Mars** – Has introduced a 3.7 oz. Snickers King Size and 3.1 oz. sizes of M&M's Plain King Size and M&M Peanut King Size. Is now testing a 2.1 oz. size of Royal Mint Chocolates in military and civilian markets in the Baltimore/Washington area.

■ **Peter Paul Cadbury** – In 1984 restaged entire Cadbury lineup of products with new sizes, labels, and packages. These "very, very successful" relaunches included Cadbury's Dairy Milk Chocolate, Hazelnut, Brazilnut, Fruit & Nut, and Almond Bars in a giant 7 oz. size; Caramello Bar, 6.5 oz.; plus Caramello, Dairy Milk Chocolate, Hazelnut, Fruit & Nut, and Almond Bars in a 3.5 oz. large bar size.



**In the chips/cookies/crackers segment of the snack food industry, the trend is toward lighter, less oily or salty, or thicker or different textures.**

"There's a tremendous number of new products in the candy industry which were fostered, in part, because commodity costs came down so rapidly between 1980 and 1983," says food industry analyst Ronald Morrow, vice president of research for Smith Barney, Harris Upham & Co., New York. "Most of the major candy producers have really tried to upgrade their product line to capture the premium price segment. The growth in this area has been fairly dramatic," Morrow explains.

The growing popularity of the new big bar category, which captured 7 percent of 1984 sales for all loose candy bars sold in the U.S. may gradually erode the ingrained reluctance of commissary stores to stock and merchandise single candy bars, some in the industry feel.

Hershey Chocolate Company, which ranks very closely behind M&M/Mars as the leading candy producer and supplier to the military, last year tested its Hershey Big Block and three premium-priced big bar singles in three military commissary regions. The test was so successful, according to Christopher Coyle, manager for government sales, that Hershey hopes to see the commissary stores of the other service branches accept these products.

## Other New Product Trends

As this story was being written, M&M/Mars was planning to introduce a completely new candy product, Fanfare rolled chocolates, exclusively to the military market prior to any civilian market introduction.

By using military commissaries and exchanges for the introduction, the company could encompass an entire marketplace with no spillover, yet not overtax production capacity, Mr. Finelli explained. Fanfare is a light, rolled chocolate snack with a hazelnut creme center in a gift box.

In the chips/cookies/crackers segment of the snack food industry, the trend is toward new products that are lighter, less oily or salty, or which are a little thicker or have different textures, notes industry analyst Morrow at Smith Barney.

"This industry is just coming out of a recession where there was no growth at all. There was an absolute dearth of new products. We've seen much more product introduction this last year," the food analyst said, noting that although the industry has since been somewhat revitalized, it's not showing the kind of sales and unit movement that it used to grow at.

Frito-Lay's new thicker O'Grady's brand potato chip was the biggest new entry in

## Advertising To The Military

Because military consumers get a great deal of exposure to civilian advertising, the confectionary and snack food industry relies heavily on its domestic print, radio, and television ads to capture the military market. As one experienced military marketer points out, "They all have TV!"

One message that will be beaming into military homes this year via civilian advertising is that chocolate bars are permissible snack foods to include in a regular diet. Major U.S. candy makers have repositioned chocolate as a satisfying food rather than an occasional taste treat.

But in addition to their regular schedule of civilian advertising, most of the bigger candy and snack food companies, including M&M/Mars, Frito-Lay, Life Savers, and Nabisco, also use at least a limited amount of coupon-type print ads in military-only publications.

Hershey Chocolate Company, which for some years directed no special advertising to the military, will run two coupon ads in military publications in 1985, and may expand its military media schedule in 1986.

"The military tends to stick with the military. It's very much a closed community," says one military sales director in explaining his company's use of military advertising.

"We find military advertising useful," another explains, "because there is a certain degree of the military market that really isn't exposed to the civilian media."

1984, a Frito-Lay spokesman said. He added that O'Grady's brand potato chips sold over $200 million retail in its first year.

Moist, chewy cookies are another new entry the industry has high hopes for this year. Nabisco's new line in this category, Almost Home, is joined by others, including a Keebler soft cookie, Soft Batch; a Duncan Hines ready-to-eat cookie just introduced by Procter and Gamble; and a Frito-Lay soft cookie addition to its Grandma's cookie line.

"It's an open, active, alert, alive marketplace. It had been static until we all got excited about this new soft-baked type cookie like Almost Home," says E.R. "Tubby" Seawell, director of military sales for Nabisco Brands USA and current president of the American Logistics Association.

"I believe we've just got more people eating more cookies," Seawell comments. "The cookie market had been static, but we seem to have expanded that market with some real across-the-board growth in all cookie categories," he adds.

## Displays And Promotions

Another growing trend in the candy and snack food industry is the increased use of point of purchase (POP) displays and promotions to increase store traffic and boost sales. In some cases, when offered with voluntary price reductions (VPRs), the results of these merchandising efforts are very dramatic.

One manufacturer's military sales director, who asked not to be identified for competitive reasons, said that when his company offers VPRs, and is successful in getting end-aisle or off-shelf floor displays for its popular cookie product, the sales velocity tends to jump *ten times* the normal monthly consumption.

Life Savers, a Nabisco company, is trying to interest resale outlets in specialized "prepack displays," which Gaynor estimates can triple the sales of a product when properly used.

A prepack display is a self-contained shipper with product and a fold-out sign explaining a special offer inside.

"We just did a very, very successful Baby Ruth and Butterfinger prepack display in exchanges that featured four candy bars for 99¢," Gaynor explains. "We just shipped the prepack displays to the exchanges and they simply unfolded them to create our instant floor stand displays."

Frito-Lay provides custom-tailored point of purchase display racks and merchandising materials to its military customers, in addition to monthly VPRs and special VPRs for its new products.

In commissary stores these are typically secondary displays called "maximizers," used for temporary or permanent displays in key store locations. In exchanges, particularly in shoppettes and mini-marts, the resale outlet would be more likely to receive "front end" impulse merchandiser racks to place near cash registers.

Through its worldwide military broker, Peter Paul Cadbury is running a springtime point of purchase promotion in commissaries and exchanges which is tied to the Special Olympics for handicapped children.

The candy maker used the same promotion last year, pledging to donate a certain dollar (or dollar fraction) amount per case sold to the Special Olympics.

"It was a very successful promotion," says Cadbury's James Rowlette, division manager of key accounts. "We found, of course, that military people were very generous and seemed to support the sales effort, realizing that the money was going to a very good cause."

The Army and Air Force Exchange System (AAFES) and the Navy Resale and Services Support Office (NAVRESSO) each have developed their own exchange-wide programs to employ point of purchase displays more effectively at the front end of their exchange stores.

At AAFES, the effort is extensively detailed in headquarters-developed planograms, depicting the exact configurations exchange stores should use to lay out impulse items in their front-end display racks.

According to merchandising information researched and developed by one leading candy manufacturer, front-end candy profits can be greatly increased by using vertical checkout merchandising racks and or carousel-type display units, for leading brands and king-size candy bars.

For commissaries, however, this manufacturer's research concludes that these types of items should *not* be merchandised on the mid-store candy gondola(s) with packaged items. This could cause "trading

## Sugar Deliveries Top 2.2 Billion Pounds

Confectioners bought some 450.5 million *more* pounds of sugar last year than they did five years earlier, marking a close parallel with the lower commodity prices industry analysts say have helped to spur the introduction of new candy products. The following figures, which detail the actual amounts of sugar delivered to producers of confectionary and related products, were supplied by the statistical reporting service of the U.S. Department of Agriculture:

| Year | Pounds of Sugar Delivered to Confectioners |
|---|---|
| 1979 | 1,762,083,500 |
| 1980 | 1,812,168,900 |
| 1981 | 1,926,498,700 |
| 1982 | 1,878,725,300 |
| 1983 | 2,174,342,100 |
| 1984 | 2,212,546,300 |

# The Military's Leading Best-Sellers

Neither the Army nor Navy commissary systems were able to provide breakdowns for total sales of candy and snack foods, or which items in those categories are best sellers. However, the Air Force Commissary Service (AFCOMS), Navy Resale and Services Support Office (NAVRESSO) for exchanges only, and the Army and Air Force Exchange Service (AAFES) all provided *Interservice* with up-to-date statistics, which follow below:

## AAFES

Candy and snack foods combined represent 3.3% of AAFES total worldwide sales, or $116,200,000. Category-by-category sales breakdowns are as follows:

| Category | % of Total AAFES Sales | | Category $ Sales |
|---|---|---|---|
| Candy bars | .85% of sales, | or | $30,000,000 |
| Multipack candy, bars and bags | .53% of sales, | or | $18,500,000 |
| Boxed candy | .14% of sales, | or | $ 5,000,000 |
| Chips (potato and corn) | .51% of sales, | or | $18,000,000 |
| Cookies | .51% of sales, | or | $18,000,000 |
| Nuts | .23% of sales, | or | $ 8,100,000 |
| Miscellaneous snacks | .17% of sales, | or | $ 6,000,000 |
| Chewing gum | .22% of sales, | or | $ 7,800,000 |
| Mints | .09% of sales, | or | $ 3,000,000 |
| Cough drops | .05% of sales, | or | $ 1,800,000 |

**AAFES Top Ten Snack Items**

| | |
|---|---|
| 1. Fritos brand corn chips, 2 oz. size | $1,958,041 |
| 2. Chips Ahoy chocolate chip cookies, 13 oz. | $1,002,989 |
| 3. Cashews (salted), 6.5 oz. | $1,635,000 |
| 4. Mixed nuts with peanuts, 12 oz. | $ 854,635 |
| 5. Pistachio nuts, 6 oz. pack | $ 746,357 |
| 6. Potato chips, 7.5 or 8 oz. | $ 743,294 |
| 7. Ritz crackers, 12 oz. | $ 691,990 |
| 8. Oreo cookies, 16 oz. | $ 688,986 |
| 9. Doritos brand tortilla chips, 7.5 oz. | $ 671,494 |
| 10. Fig Newton cookies, 16 oz. | $ 634,874 |

**AAFES Top Ten 35¢ Candy Bars**

| | |
|---|---|
| 1. Snickers | $3,431,515 |
| 2. M&M's Peanut | $2,808,942 |
| 3. Reese's Peanut Butter Cups | $1,769,916 |
| 4. M&M's Plain | $1,529,272 |
| 5. Kit Kat | $1,330,285 |
| 6. Baby Ruth | $1,238,831 |
| 7. Butterfinger | $1,077,435 |
| 8. Three Musketeers | $ 966,272 |
| 9. Peter Paul Almond Joy | $ 850,579 |
| 10. Twix Caramel | $ 780,573 |

## AFCOMS

Candy represents 1.5% of Air Force commissary grocery sales worldwide, or $24,256,575 for fiscal year 1984; snack foods represent 2.5% of sales, or $40,427,624. Total sales for candy and snack foods amounted to $64,684,199.

According to the Air Force Commissary Service (AFCOMS), the top selling candy items in Air Force commissaries are: Snickers; M&M's Chocolate Candies; Milky Way Bars; Reese's Peanut Butter Cups; Hershey Chocolate Bars; Mars Bars; Three Musketeers Bars; Nestles Chocolate Bars; and Butterfinger.

The top selling AFCOMS snack items are: Lay's brand potato chips; Ruffles brand potato chips; Fritos brand corn chips; Doritos brand nacho cheese tortilla chips; Planters peanuts; Orville Redenbacher popcorn; Jolly Time popcorn; Pringles potato chips; Rold Gold pretzels; and Planters assorted snacks.

## NAVRESSO—Exchanges

For 11 months of operation through December 1984, Navy exchanges reported worldwide candy sales of $15,975,000, representing a 12% increase over the same period of 1983.

Worldwide retail snack sales for the period were $1,047,010, an increase of 4.5% over the same span of 1983.

Approximately 2.8% of total Navy exchange retail sales are represented by candy and snack purchases.

The best-selling candy and snack food products in Navy exchanges, not necessarily in order, include: Snickers Bar; M&M Peanut and Plain Chocolate Candies; Kit Kat Bar; 3-Musketeers Bar; Reese's Peanut Butter Cups; chocolate chip cookies (all brands); Oreo Cookies; and Frito-Lay salty snacks (all varieties and sizes).

Based on these figures, Navy exchange sales of candy and snack food items increased at a rate almost triple that for overall retail sales.

## Seasonal Candy, Snack Sales To The Military A Treat, No Trick

When Halloween, Easter, Christmas, and Valentine's Day roll around each year, they keep military sales managers in the candy and snack food industry smiling.

"We do a better job relatively speaking on Halloween in the military than we do in civilian business," explained Ken Gaynor, national manager of military sales for Life Savers, Inc.

"We have a little less competition, for one thing. Plus the military consumers are young, they are very price conscious, they usually know a good deal, and they are volume conscious. They prefer larger pack sizes. Even though they won't necessarily be given out as Trick or Treat items, those are the type packs that appeal to military patrons."

For those reasons, and also because holiday candy items tend to be planned purchases rather than impulse buys, commissaries do a much larger volume of the Halloween business than do exchanges, he noted.

Other industry spokesmen agree that the military market rivals, if not betters, the civilian market for its relative volume of holiday sales in candies and snack foods.

"Military customers buy more regular candy items that are wrapped in special 'seasonality packs' (i.e., red and green foil for Christmas) than do their civilian counterparts,' comments James Finelli, military government manager for M&M/Mars.

At Peter Paul Cadbury, which does a heavy Easter trade with its popular Cadbury Creme Eggs and Cadbury Mini Eggs, division manager of key accounts James Rowlette believes one of the reasons why the company has such an excellent seasonal franchise in the military market is "because so many of the military people have traveled to Europe at one time or another in their careers, and are more familiar with the Cadbury name."

The cookie/cracker segment of the industry is also affected by cyclical or holiday buying, according to Nabisco Brands USA director of military sales, E.R. "Tubby" Seawell.

"During the last two months of the year, when Thanksgiving arrives and the Christmas and New Year's holidays are coming, our sales of snack crackers like Triscuits and Wheat Thins, plus Ritz Crackers and Premium Saltines, tend to jump appreciably because of the holiday season and the partying," he said.

"The military is beginning to recoup the benefits from the seasons," states Christopher Coyle, manager of government sales for Hershey Chocolate. "They are beginning to understand from a store level how important seasons are in satisfying their patrons. And the Halloween, Easter and Christmas trade is becoming a larger segment of our business year by year."

down" from packages to singles, versus the opportunity to create new sales and category expansion with singles and king sizes at the front of the store.

### What Military Buyers Are Doing

Military buyers at exchanges in particular are paying closer attention to more sophisticated merchandising techniques, and are placing more emphasis on outside research to make decisions about candy and snack food buys.

Three of the basic "yardstick" research tools widely studied by the military include data from Sales Area Marketing, Inc. (SAMI), which tracks product movement through warehouses; data from A.C. Neilsen, which tracks product movement through the front end of retail outlets; and data from Distributors Electronic Billing Systems (DEBS), which tracks product movement through distributors.

SAMI data is said to have the most credibility with the military, despite the fact that some snack food items, such as cookies and crackers, are not included in the data. For example, the U.S. Army Troop Support Agency, the resale service for the Army commissary system, cited SAMI statistics as a guideline for what sells best in its commissary stores.

Research provided by the food companies themselves is also taking on a new importance to military buyers. One leading manufacturer, for example, has developed an audiovisual confectionery sales growth program presentation for the headquarters of the various resale systems.

"It's important that the military receive the benefits of all the merchandising studies and technology available from major companies," Gaynor of Life Savers believes.

"If companies can give a good, objective approach to merchandising everyone's products, the military will benefit, the patrons will benefit, the stores will benefit, and individual companies will get their fair share of the business. As far as we're concerned, that's what we're looking for," Gaynor concludes.

**Research provided by the food companies themselves is taking on a new importance to military buyers.**

"I think the military's doing a nice job of staying current with the marketplace. The resale services seem to be more attuned and alert to new item introductions and innovations in merchandising and new product lines," Nabisco's Seawell added.

One military sales manager sums it up this way: "Some years back we usually had to wait until we had a product completely launched in the civilian marketplace. Now they [the resale services] want to be included in the test markets and relaunches, and they want to have the product when the civilian advertising breaks."

Indeed, the biggest challenge, if current trends in the candy-confectionery and snack foods markets continue, will simply be to keep abreast of new products and the occasional creation of entirely new item categories.

Today's indications are that the resale systems and their suppliers are up to the challenge, and will continue to work to bring military customers their preferred munch bunch. ■

# 4th Annual Military Demographics Report

BY ALAN GOLDSTEIN

Attempting to find the one fact or figure that speaks for all others in the military demographics datastream is a seemingly impossible task. The profile of people in uniform, their dependents, and aggregate numbers counting and tabulating the millions of others considered to be in the military orbit must simply take into account too many variables to be meaningful to market research and sales planning specialists.

The dilemma is that what interests one specialist may be of no particular intrinsic value to anyone else.

This report therefore marks a departure from *Interservice* coverage of the subject in previous years. The followi[illegible]es reflect an attempt to distill into a minimum amount of space those salient facts and figures with the greatest intrinsic value to the greatest number of readers.

The words that best sum up the DoD's current manpower efforts are "consistency" and "improvement." Recruiting targets have consistently been met or exceeded, and the quality and education of today's recruits has improved markedly.

Despite a stepped-up reliance on Guard and Reserve forces, the Pentagon is seeking an FY86 active duty end strength increase of 25,630 men and women over FY85 levels to almost 2.2 million. Provided Congress approves the DoD's request, the Navy's strength will increase by 15,000; the Air Force will add 9,430; the Marine Corps will swell by 1,200; and the Army's active strength will remain unchanged.

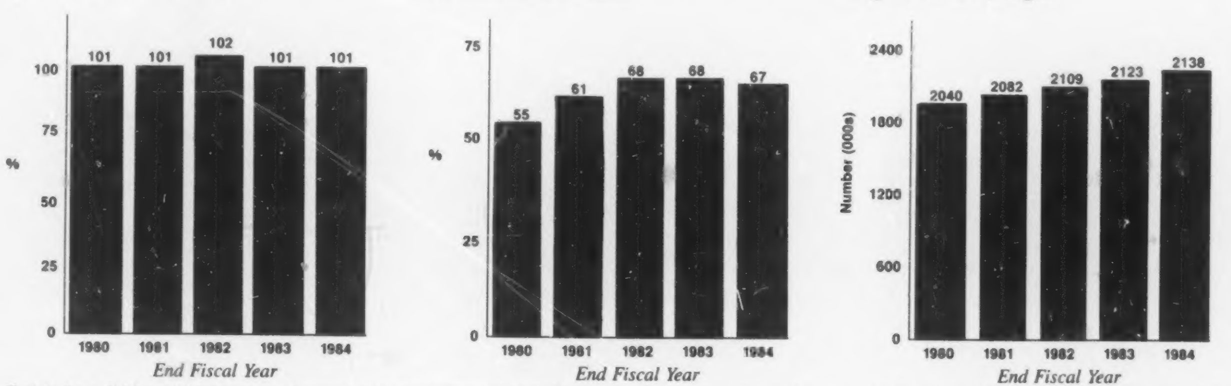
The DoD's pay, compensation, and people-benefits story is a promising one. A 3% military pay raise programmed for FY86 is effective July 1 this year, and a DoD legislative package that seeks to improve health, PCS, and other benefits and allowances seem all but assured of passage.

Closely allied with pay, allowances, and other quality of life improvements are a series of actions designed to emphasize and recognize the military family. Housing construction for families, for example, has increased 81% since President Reagan took office.

The following tables are intended only to serve as a basic outline of the military's current demographic profile. Anyone who wishes to delve further into the military demographics datastream is encouraged to contact the American Logistics Association for additional information. ■

*Alan Goldstein is director of information and research with the American Logistics Association. He's also editor of* Interservice *magazine.*

## DoD's Military Manpower Improvements 1980–1984



**Recruiting Goals Exceeded** **Re-Enlistments Stable** **Higher Total Strength***

*Includes Navy, Training and Administration of Reserves (TARs) that are counted as Selected Reservists.

*Source:* Department of Defense, *Annual Report to the Congress, Fiscal Year 1986.*

## All Military On Active Duty By Pay Grade (As of September 30, 1984)

| Rank/Grade | Total DoD | Army | Navy | Marine Corps | Air Force |
|---|---|---|---|---|---|
| | | | **Officers** | | |
| General-Admiral | 35 | 12 | 8 | 2 | 13 |
| Lieutenant General-Vice Admiral | 127 | 49 | 33 | 7 | 38 |
| Major General-Rear Admiral (Upper) | 362 | 140 | 82 | 23 | 117 |
| Brigadier General-Rear Admiral (Lower)* | 525 | 195 | 128 | 33 | 169 |
| Colonel-Captain | 14,625 | 4,783 | 3,709 | 627 | 5,506 |
| Lieutenant Colonel-Commander | 32,600 | 10,771 | 7,626 | 1,653 | 12,550 |
| Major-Lieutenant Commander | 52,339 | 16,913 | 12,855 | 3,051 | 19,520 |
| Captain-Lieutenant | 101,713 | 34,772 | 21,248 | 6,082 | 39,611 |
| 1st Lieutenant-Lieutenant (Junior Grade) | 41,604 | 12,249 | 10,584 | 4,371 | 14,400 |
| 2nd Lieutenant-Ensign | 39,522 | 12,600 | 9,501 | 3,106 | 14,315 |
| Warrant Officers (W-1 to W-4) | 19,892 | 15,399 | 3,082 | 1,411 | – |
| **Total Officers** | **303,344** | **107,883** | **68,856** | **20,366** | **106,239** |
| | | | **Enlisted** | | |
| E-9 | 14,311 | 4,182 | 4,025 | 1,262 | 4,842 |
| E-8 | 37,843 | 15,647 | 8,801 | 3,732 | 9,663 |
| E-7 | 126,966 | 50,557 | 30,713 | 9,177 | 36,519 |
| E-6 | 231,538 | 86,856 | 72,987 | 15,434 | 56,261 |
| E-5 | 350,838 | 118,492 | 98,419 | 25,068 | 108,859 |
| E-4 | 422,670 | 183,661 | 104,298 | 31,953 | 102,758 |
| E-3 | 370,133 | 98,860 | 98,973 | 47,648 | 124,652 |
| E-2 | 137,150 | 51,929 | 37,366 | 25,834 | 22,021 |
| E-1 | 129,808 | 57,527 | 35,706 | 15,740 | 20,835 |
| **Total Enlisted** | **1,821,257** | **667,711** | **491,288** | **175,848** | **486,410** |
| **Cadets & Midshipmen** | **13,556** | **4,586** | **4,494** | **–** | **4,476** |
| **Grand Total** | **2,138,157** | **780,180** | **564,638** | **196,214** | **597,125** |

*Includes the newly re-established rank of Commodore.

*Source:* Department of Defense, *Selected Manpower Statistics – FY 84.*

## Median Age Of Military Personnel By Sex (As of September 30, 1984)

| | **Active Duty Males** | | | | **Active Duty Females** | | | |
|---|---|---|---|---|---|---|---|---|
| | 1983 | | 1984 | | 1984 | | 1984 | |
| Attained Age | Number | % | Number | % | Number | % | Number | % |
| 17 | 7,000 | .4 | 7,000 | .4 | 1,000 | .3 | 1,000 | .4 |
| 18 | 65,000 | 3.4 | 66,000 | 3.4 | 6,000 | 2.8 | 6,000 | 3.1 |
| 19 | 137,000 | 7.2 | 128,000 | 6.7 | 13,000 | 6.7 | 12,000 | 6.1 |
| 20 | 166,000 | 8.7 | 163,000 | 8.5 | 18,000 | 9.3 | 16,000 | 8.2 |
| 21 | 165,000 | 8.6 | 162,000 | 8.4 | 20,000 | 10.1 | 19,000 | 9.3 |
| 22 | 151,000 | 7.9 | 146,000 | 7.6 | 20,000 | 10.2 | 19,000 | 9.5 |
| 23 | 131,000 | 6.8 | 133,000 | 6.9 | 18,000 | 9.0 | 18,000 | 9.2 |
| 24 | 113,000 | 5.9 | 117,000 | 6.1 | 16,000 | 8.2 | 16,000 | 8.0 |
| 25 | 99,000 | 5.2 | 102,000 | 5.3 | 14,000 | 6.9 | 15,000 | 7.3 |
| 26 | 88,000 | 4.6 | 90,000 | 4.7 | 12,000 | 6.2 | 12,000 | 6.1 |
| 27 | 78,000 | 4.1 | 81,000 | 4.2 | 10,000 | 6.4 | 11,000 | 5.5 |
| 28 | 70,000 | 3.7 | 72,000 | 3.7 | 9,000 | 4.6 | 10,000 | 4.8 |
| 29 | 64,000 | 3.3 | 65,000 | 3.4 | 8,000 | 4.1 | 8,000 | 4.2 |
| 30 | 59,000 | 3.1 | 60,000 | 3.1 | 7,000 | 3.4 | 7,000 | 3.6 |
| 31 | 54,000 | 2.8 | 55,000 | 2.9 | 5,000 | 2.7 | 6,000 | 3.0 |
| 32 | 49,000 | 2.6 | 51,000 | 2.7 | 4,000 | 2.2 | 5,000 | 2.5 |
| 33 | 46,000 | 2.4 | 47,000 | 2.4 | 3,000 | 1.7 | 4,000 | 2.1 |
| 34 | 48,000 | 2.5 | 45,000 | 2.3 | 3,000 | 1.4 | 3,000 | 1.6 |
| 35 | 48,000 | 2.5 | 46,000 | 2.4 | 2,000 | 1.1 | 3,000 | 1.3 |
| 36 | 51,000 | 2.7 | 46,000 | 2.4 | 2,000 | 1.0 | 2,000 | 1.0 |
| 37 | 38,000 | 2.0 | 49,000 | 2.5 | 1,000 | .6 | 2,000 | .9 |
| 38 | 31,000 | 1.6 | 35,000 | 1.8 | 1,000 | .4 | 1,000 | .5 |
| 39 | 29,000 | 1.5 | 28,000 | 1.4 | 1,000 | .3 | 1,000 | .4 |
| 40-44 | 90,000 | 4.7 | 90,000 | 4.7 | 2,000 | .9 | 2,000 | 1.0 |
| 45-49 | 29,000 | 1.5 | 29,000 | 1.5 | 1,000 | .3 | 1,000 | .3 |
| 50 & Over | 8,000 | .4 | 8,000 | .4 | * | .2 | * | .2 |
| **Total Over 40** | **127,000** | **6.6** | **119,000** | **6.2** | **3,000** | **1.4** | **3,000** | **1.3** |
| **Total** | **1,914,000** | **100.0%** | **1,921,000** | **100.0%** | **197,000** | **100.0%** | **200,000** | **100.0%** |
| Median Age in Years | 24.6 | | 24.7 | | 23.6 | | 23.7 | |

*Less than 500.

*Source:* Department of Defense, *Selected Manpower Statistics – FY 1984.*

# Distribution of Active Duty Military by Region and State (As of September 30, 1984)

| | Active Duty Military Population | | | | | | 1980 Population Census | |
|---|---|---|---|---|---|---|---|---|
| Region and State | Army | Navy | Air Force | Total Number | % of U.S. Total | % Change 1983–84 | Total | % of U.S. |
| **New England** | 6,407 | 13,109 | 10,038 | 29,554 | 2.1 | −0.8 | 12,348,200 | 5.4 |
| Connecticut | 209 | 6,202 | 56 | 6,467 | 0.4 | +10.3 | 3,107,500 | 1.4 |
| Maine | 40 | 1,774 | 3,264 | 5,438 | 0.3 | +0.4 | 1,124,600 | 0.5 |
| Massachusetts | 5,918 | 1,030 | 2,566 | 9,514 | 0.6 | −8.4 | 5,736,000 | 2.5 |
| New Hampshire | 113 | 340 | 3,704 | 4,157 | 0.3 | +1.5 | 920,600 | 0.4 |
| Rhode Island | 100 | 3,754 | 59 | 3,913 | 0.2 | −1.5 | 947,100 | 0.4 |
| Vermont | 27 | 9 | 29 | 65 | 0.0 | +8.3 | 511,400 | 0.2 |
| **Mid Atlantic** | 42,137 | 29,197 | 31,409 | 102,703 | 7.5 | −3.3 | 42,237,100 | 18.6 |
| Delaware | 42 | 23 | 4,884 | 4,909 | 0.3 | −0.5 | 595,200 | 0.3 |
| District of Columbia | 5,627 | 4,124 | 3,201 | 12,952 | 0.9 | −2.9 | 637,600 | 0.3 |
| Maryland | 11,959 | 14,852 | 8,752 | 35,563 | 2.5 | −0.5 | 4,216,300 | 1.9 |
| New Jersey | 13,036 | 1,824 | 5,029 | 19,889 | 1.4 | −7.3 | 7,364,100 | 3.3 |
| New York | 9,307 | 3,874 | 9,186 | 22,367 | 1.6 | −1.5 | 17,557,200 | 7.8 |
| Pennsylvania | 2,166 | 4,500 | 357 | 7,023 | 0.5 | −12.2 | 11,866,700 | 5.2 |
| **Great Lakes** | 7,242 | 24,763 | 36,115 | 68,120 | 5.0 | +5.2 | 41,669,500 | 18.4 |
| Illinois | 2,095 | 22,394 | 12,945 | 37,434 | 2.7 | +3.2 | 11,418,400 | 5.0 |
| Indiana | 3,000 | 566 | 2,705 | 6,271 | 0.4 | +3.5 | 5,490,100 | 2.4 |
| Michigan | 883 | 635 | 7,749 | 9,267 | 0.6 | −3.5 | 9,258,300 | 4.1 |
| Ohio | 823 | 860 | 12,614 | 14,297 | 1.0 | +20.8 | 10,797,400 | 4.8 |
| Wisconsin | 441 | 308 | 102 | 851 | 0.0 | −9.8 | 4,705,300 | 2.1 |
| **Plains** | 30,595 | 2,2331 | 38,165 | 70,991 | 5.2 | −4.2 | 17,181,700 | 7.5 |
| Iowa | 203 | 128 | 58 | 389 | 0.0 | −15.2 | 2,913,300 | 1.3 |
| Kansas | 18,359 | 446 | 3,819 | 22,624 | 1.6 | −8.1 | 2,363,200 | 1.0 |
| Minnesota | 333 | 360 | 129 | 822 | 0.0 | −10.3 | 4,077,100 | 1.8 |
| Missouri | 11,363 | 967 | 3,665 | 15,995 | 1.1 | −9.5 | 4,917,400 | 2.2 |
| Nebraska | 248 | 313 | 12,365 | 12,925 | 0.9 | +5.2 | 1,570,000 | 0.7 |
| North Dakota | 29 | 9 | 11,883 | 11,291 | 0.8 | +3.9 | 652,600 | 0.3 |
| South Dakota | 60 | 8 | 6,247 | 6,315 | 0.4 | +0.0 | 690,100 | 0.3 |
| **Southeast** | 218,335 | 173,236 | 110,149 | 501,720 | 36.6 | −1.5 | | |
| Alabama | 19,903 | 651 | 4,624 | 25,178 | 1.8 | +0.4 | 3,890,000 | 1.7 |
| Arkansas | 393 | 202 | 9,525 | 10,120 | 0.7 | +2.3 | 2,285,500 | 1.0 |
| Florida | 1,965 | 37,500 | 29,638 | 69,103 | 5.0 | −2.5 | 9,739,900 | 4.3 |
| Georgia | 52,501 | 2,957 | 4,276 | 59,734 | 4.3 | −5.1 | 5,464,200 | 2.4 |
| Kentucky | 38,768 | 236 | 265 | 39,269 | 2.8 | −5.1 | 3,661,400 | 1.6 |
| Louisiana | 15,076 | 1,656 | 8,994 | 25,726 | 1.8 | −0.8 | 4,203,900 | 1.9 |
| Mississippi | 330 | 4,124 | 13,761 | 18,215 | 1.3 | +0.5 | 2,520,600 | 1.1 |
| North Carolina | 42,331 | 48,155 | 9,741 | 100,227 | 7.3 | +2.4 | 5,874,400 | 2.6 |
| South Carolina | 13,277 | 18,805 | 13,647 | 45,729 | 3.3 | −9.0 | 3,119,200 | 1.4 |
| Tennessee | 350 | 11,518 | 297 | 12,165 | 0.8 | +2.8 | 4,590,700 | 2.0 |
| Virginia | 33,300 | 47,188 | 15,337 | 95,825 | 6.9 | +1.8 | 5,346,200 | 2.4 |
| West Virginia | 141 | 244 | 44 | 429 | 0.0 | −2.0 | 1,949,600 | 0.9 |
| **Southwest** | 90,680 | 9,350 | 101,552 | 201,582 | 14.7 | −2.4 | 52,645,600 | 23.2 |
| Arizona | 6,683 | 1,130 | 14,805 | 22,618 | 1.6 | −7.4 | 2,717,800 | 1.2 |
| New Mexico | 1,403 | 546 | 15,007 | 16,956 | 1.2 | +0.4 | 1,299,900 | 0.6 |
| Oklahoma | 18,212 | 192 | 12,390 | 30,794 | 2.2 | −3.4 | 3,025,200 | 1.3 |
| Texas | 64,382 | 7,482 | 59,350 | 131,214 | 9.5 | −1.6 | 14,228,300 | 6.3 |
| **Rocky Mountain** | 22,205 | 2,478 | 35,163 | 59,846 | 4.4 | −0.4 | 21,271,200 | 9.3 |
| Colorado | 21,515 | 694 | 17,850 | 40,059 | 2.9 | +0.4 | 2,888,800 | 1.3 |
| Idaho | 49 | 1,693 | 4,012 | 5,754 | 0.4 | −4.1 | 943,900 | 0.4 |
| Montana | 33 | 22 | 3,986 | 4,041 | 0.2 | −2.8 | 786,600 | 0.3 |
| Utah | 587 | 63 | 5,471 | 6,121 | 0.4 | −1.9 | 1,461,000 | 0.6 |
| Wyoming | 21 | 6 | 3,844 | 3,871 | 0.2 | +1.3 | 470,800 | 0.2 |
| **Far West** | 80,275 | 151,850 | 92,079 | 324,174 | 23.6 | −0.6 | 32,595,700 | 14.3 |
| Alaska | 8,153 | 1,797 | 11,032 | 20,982 | 1.5 | +1.4 | 400,400 | 0.2 |
| California | 27,788 | 121,584 | 54,419 | 203,791 | 14.8 | −0.4 | 23,668,500 | 10.4 |
| Hawaii | 19,405 | 19,007 | 6,846 | 45,258 | 3.2 | −1.0 | 965,000 | 0.4 |
| Nevada | 21 | 823 | 9,569 | 10,413 | 0.7 | −11.9 | 799,100 | 0.4 |
| Oregon | 205 | 498 | 69 | 772 | 0.0 | +0.3 | 2,632,600 | 1.2 |
| Washington | 24,703 | 8,141 | 10,144 | 42,958 | 3.1 | +0.9 | 4,130,100 | 1.8 |
| Undistributed | −0− | 12,980 | −0− | 12,980 | .9 | −0− | −0− | −0− |
| **Total U.S.** | **497,876** | **419,194** | **454,600** | **1,371,670** | **100.0** | **−2.7** | **226,504,825** | **100.0** |

*Notes:* Military details will not add to totals due to rounding. Navy totals include Marine Corps personnel; excluded are Navy/Marine Corps afloat or temporarily shore-based personnel. Census data are as of April 1, 1980.
*Source:* Department of Defense, *Distribution of Personnel by State and Selected Locations – Sept. 30, 1984.*

## Top 10 Foreign Countries By U.S. Active Duty Personnel (As of December 30, 1984)

| Rank Country | Army | Navy | Marine Corps | Air Force | Total |
|---|---|---|---|---|---|
| 1. Germany (Fed. Rep. & W. Berlin) | 209,188 | 337 | 98 | 39,380 | **249,003** |
| 2. Japan (Including Okinawa) | 2,511 | 7,726 | 21,809 | 15,216 | **47,262** |
| 3. Republic of Korea | 28,556 | 373 | 68 | 11,094 | **40,091** |
| 4. United Kingdom | 206 | 2,257 | 366 | 25,841 | **28,670** |
| 5. Philippines | 44 | 5,060 | 686 | 9,383 | **15,173** |
| 6. Italy | 4,111 | 4,679 | 248 | 5,326 | **14,364** |
| 7. Panama | 6,676 | 391 | 147 | 2,198 | **9,412** |
| 8. Spain | 21 | 3,907 | 207 | 5,166 | **9,301** |
| 9. Turkey | 1,277 | 103 | 19 | 3,744 | **5,143** |
| 10. Greece | 535 | 470 | 14 | 2,676 | **3,695** |

## Active Duty Personnel Overseas (As of September 30, 1984)

| Regional Area/Country | Army | Navy | Marine Corps | Air Force | Active Duty Total | % Change 83-84 |
|---|---|---|---|---|---|---|
| **Totals** | **258,780** | **265,146** | **31,172** | **131,387** | **686,485** | **−21.9** |
| **Western & Southern Europe** | 217,723 | 24,377 | 3,000 | 88,354 | **333,454** | **−2.7** |
| West Germany | 209,188 | 377 | 98 | 39,380 | 249,003 | −2.2 |
| United Kingdom | 206 | 2,257 | 366 | 25,841 | 28,670 | +2.4 |
| Italy | 4,111 | 4,679 | 248 | 5,326 | 14,364 | +5.9 |
| Spain | 21 | 3,907 | 207 | 5,166 | 9,301 | −1.1 |
| Turkey | 1,277 | 103 | 19 | 3,744 | 5,143 | −3.4 |
| Afloat | 0 | 10,243 | 1,740 | 0 | 11,983 | −48.0 |
| **U.S. Territory & Special Locations** | 705 | 181,002 | 534 | 4,135 | **186,376** | **+17.4** |
| Guam | 33 | 4,716 | 358 | 4,062 | 9,169 | −0.3 |
| Puerto Rico | 495 | 3,007 | 176 | 46 | 3,724 | −2.4 |
| Afloat | 0 | 173,239 | 0 | 0 | 173,239 | +4.7 |
| **East Asia & Pacific** | 31,254 | 36,832 | 25,516 | 36,035 | **129,637** | **−5.7** |
| Japan | 2,511 | 7,726 | 21,809 | 15,216 | 47,262 | −3.1 |
| Korea | 28,556 | 373 | 68 | 11,094 | 40,091 | +3.5 |
| Philippines | 44 | 5,060 | 686 | 9,383 | 15,173 | +2.1 |
| Afloat | 0 | 23,156 | 2,865 | 0 | 26,021 | −29.4 |
| **Africa, Near East & South Asia** | 1,345 | 14,691 | 578 | 420 | **17,034** | **+20.9** |
| British Indian Ocean Territory | 0 | 1,201 | 0 | 11 | 1,212 | −34.6 |
| Egypt | 861 | 28 | 27 | 81 | 997 | −32.8 |
| Saudi Arabia | 240 | 53 | 19 | 216 | 528 | −20.3 |
| Afloat | 0 | 13,274 | 170 | 0 | 13,444 | +33.5 |
| **Western Hemisphere** | 7,685 | 8,164 | 1,448 | 2,423 | **19,720** | **−32.6** |
| Panama | 6,676 | 391 | 147 | 2,198 | 9,412 | +2.2 |
| Cuba (Guantanamo) | 0 | 1,808 | 468 | 2 | 2,278 | −3.8 |
| Bermuda | 0 | 1,368 | 86 | 0 | 1,454 | −30.0 |
| Afloat | 0 | 4,069 | 451 | 0 | 4,520 | −92.7 |
| **Eastern Europe** | 68 | 5 | 96 | 20 | **189** | **+2.6** |
| **Antartica** | 0 | 75 | 0 | 0 | **75** | **+12.0** |

*Notes:* Details will not add to totals or subtotals because data include only selected leading countries/overseas territories. No adjustments are made for "transients" or "undistributed" personnel. Alaska and Hawaii are excluded from "U.S. Territory & Special Locations" data.

*Source:* Department of Defense

# Distribution of Military Income by State
# Fiscal Year 1984 ($ In Thousands)

| State | Military Active Duty Pay | Reserve & National Guard Pay | Retired Military Pay | Total Military Payroll | Most Populous Active Duty Location |
|---|---|---|---|---|---|
| Alabama | 491,859 | 134,692 | 376,301 | 1,002,852 | Fort McClellan |
| Alaska | 358,086 | 15,894 | 54,446 | 428,426 | Elmendorf AFB |
| Arizona | 435,099 | 40,148 | 411,151 | 886,398 | Fort Huachuca |
| Arkansas | 181,454 | 44,377 | 211,726 | 437,557 | Little Rock AFB |
| California | 5,087,703 | 310,412 | 2,432,412 | 7,830,527 | San Diego |
| Colorado | 649,433 | 58,325 | 442,285 | 1,150,043 | Fort Carson |
| Connecticut | 244,486 | 31,004 | 107,625 | 383,115 | Groton |
| Delaware | 84,415 | 16,497 | 47,747 | 148,659 | Dover AFB |
| District of Columbia | 333,274 | 48,372 | 201,303 | 582,949 | Washington |
| Florida | 1,712,492 | 92,362 | 1,600,373 | 3,405,227 | Orlando |
| Georgia | 1,008,174 | 192,322 | 562,411 | 1,762,907 | Fort Benning |
| Hawaii | 1,070,475 | 30,059 | 132,432 | 1,232,966 | Schofield Barracks |
| Idaho | 100,976 | 17,041 | 75,254 | 193,271 | Mountain Home AFB |
| Illinois | 669,908 | 107,213 | 261,818 | 1,038,939 | Great Lakes |
| Indiana | 125,334 | 95,864 | 155,240 | 376,438 | Fort Benjamin Harrison |
| Iowa | 10,967 | 36,440 | 68,521 | 115,928 | Fort Des Moines |
| Kansas | 425,064 | 71,127 | 154,441 | 650,632 | Fort Riley |
| Kentucky | 619,447 | 81,002 | 168,782 | 869,231 | Fort Campbell |
| Louisiana | 419,237 | 72,051 | 266,448 | 757,736 | Fort Polk |
| Maine | 149,691 | 21,623 | 89,794 | 261,108 | Loring AFB |
| Maryland | 727,946 | 87,262 | 406,057 | 1,221,265 | Fort Meade |
| Massachusetts | 198,058 | 106,382 | 211,634 | 516,074 | Fort Devens |
| Michigan | 174,912 | 73,712 | 176,353 | 424,977 | K.I. Sawyer AFB |
| Minnesota | 21,499 | 61,977 | 106,867 | 190,343 | Minneapolis |
| Mississippi | 363,487 | 56,783 | 193,898 | 614,168 | Keesler AFB |
| Missouri | 271,718 | 121,880 | 258,963 | 652,561 | Fort Leonard Wood |
| Montana | 68,921 | 16,304 | 48,658 | 133,883 | Malmstrom AFB |
| Nebraska | 278,078 | 23,441 | 102,606 | 404,125 | Offutt AFB |
| Nevada | 197,228 | 10,142 | 148,225 | 355,595 | Nellis AFB |
| New Hampshire | 82,226 | 15,236 | 88,106 | 185,568 | Pease AFB |
| New Jersey | 334,261 | 114,941 | 242,471 | 691,673 | Fort Dix |
| New Mexico | 321,293 | 18,906 | 180,494 | 520,693 | Holloman AFB |
| New York | 401,036 | 141,352 | 280,914 | 823,302 | West Point Military Reserve |
| North Carolina | 1,699,357 | 78,420 | 496,885 | 2,274,662 | Fort Bragg |
| North Dakota | 198,853 | 14,699 | 20,717 | 234,269 | Minot AFB |
| Ohio | 284,556 | 102,626 | 304,964 | 692,146 | Wright-Patterson AFB |
| Oklahoma | 538,731 | 82,640 | 283,069 | 904,440 | Fort Sill |
| Oregon | 17,216 | 35,829 | 174,805 | 227,850 | Portland |
| Pennsylvania | 238,038 | 220,986 | 382,324 | 841,348 | Philadelphia |
| Rhode Island | 112,609 | 20,492 | 59,762 | 192,863 | Newport |
| South Carolina | 1,070,139 | 116,994 | 403,037 | 1,590,170 | Fort Jackson |
| South Dakota | 108,064 | 15,932 | 31,676 | 155,672 | Ellsworth AFB |
| Tennessee | 203,616 | 70,247 | 308,748 | 582,611 | Millington |
| Texas | 2,304,422 | 201,159 | 1,657,357 | 4,162,938 | Fort Hood |
| Utah | 119,525 | 35,527 | 88,844 | 243,896 | Hill AFB |
| Vermont | 2,074 | 13,077 | 25,042 | 40,193 | Burlington |
| Virginia | 3,355,075 | 105,706 | 1,061,424 | 4,522,205 | Arlington |
| Washington | 889,173 | 90,318 | 558,997 | 1,538,488 | Fort Lewis |
| West Virginia | 9,359 | 24,033 | 73,061 | 106,453 | Sugar Grove |
| Wisconsin | 22,580 | 111,338 | 103,420 | 237,338 | Milwaukee |
| Wyoming | 65,285 | 8,521 | 31,342 | 105,148 | Francis E. Warren AFB |
| **Total U.S.** | **28,856,909** | **3,713,687** | **16,331,230** | **48,901,826** | **Fort Bragg, NC** |
| Guam | 278,201 | 1,217 | 12,437 | 291,855 | |
| Puerto Rico | 60,960 | 24,796 | 45,182 | 130,938 | |
| **Total U.S. and Selected Areas** | **29,196,070** | **3,739,700** | **16,388,849** | **49,324,619** | |

*Note:* Payroll outlay data are estimated because calculated and prorated data are included. Outlays comprise gross earnings of personnel which, except for retired military personnel, is compensation for personnel services rendered the government and cash allowances for personnel benefits. Outlays for military personnel temporarily shore-based or afloat are reported at the members' home port.
*Source:* Department of Defense, *Atlas/State Data Abstract for the United States – FY 1984.*

# Women On Active Duty By Pay Grade (As of September 30, 1984)

| Rank/Grade | Total DoD | Army | Navy | Marine Corps | Air Force |
|---|---|---|---|---|---|
| | | | **Officers** | | |
| General-Admiral | – | – | – | – | – |
| Lieutenant General-Vice Admiral | – | – | – | – | – |
| Major General-Rear Admiral (Upper) | – | – | – | – | – |
| Brigadier General-Rear Admiral (Lower)* | 7 | 2 | 2 | – | 3 |
| Colonel-Captain | 274 | 91 | 93 | 9 | 81 |
| Lieutenant Colonel-Commander | 1,024 | 320 | 323 | 29 | 352 |
| Major-Lieutenant Commander | 3,491 | 1,192 | 1,174 | 63 | 1,062 |
| Captain-Lieutenant | 12,377 | 4,302 | 2,573 | 190 | 5,312 |
| 1st Lieutenant-Lieutenant (Junior Grade) | 5,416 | 1,912 | 1,173 | 190 | 2,141 |
| 2nd Lieutenant-Ensign | 5,778 | 2,168 | 1,194 | 133 | 2,283 |
| Warrant Officers (W-1 to W-4) | 298 | 243 | 21 | 34 | – |
| **Total Officers** | **28,665** | **10,230** | **6,553** | **648** | **11,234** |
| | | | **Enlisted** | | |
| E-9 | 54 | 18 | 11 | 11 | 14 |
| E-8 | 265 | 150 | 44 | 35 | 36 |
| E-7 | 2,267 | 1,265 | 478 | 132 | 392 |
| E-6 | 11,068 | 4,897 | 3,171 | 513 | 2,487 |
| E-5 | 37,789 | 13,314 | 9,147 | 1,626 | 13,702 |
| E-4 | 55,859 | 25,190 | 11,659 | 2,228 | 16,782 |
| E-3 | 40,062 | 10,123 | 11,592 | 2,234 | 16,113 |
| E-2 | 12,643 | 5,239 | 3,266 | 1,196 | 2,942 |
| E-1 | 12,779 | 6,420 | 2,890 | 602 | 2,867 |
| **Total Enlisted** | **172,786** | **66,616** | **42,258** | **8,577** | **55,335** |
| Cadets & Midshipmen | 1,379 | 510 | 322 | – | 547 |
| **Grand Total** | **202,830** | **77,356** | **49,133** | **9,225** | **67,116** |

*Includes the newly re-established rank of Commodore.

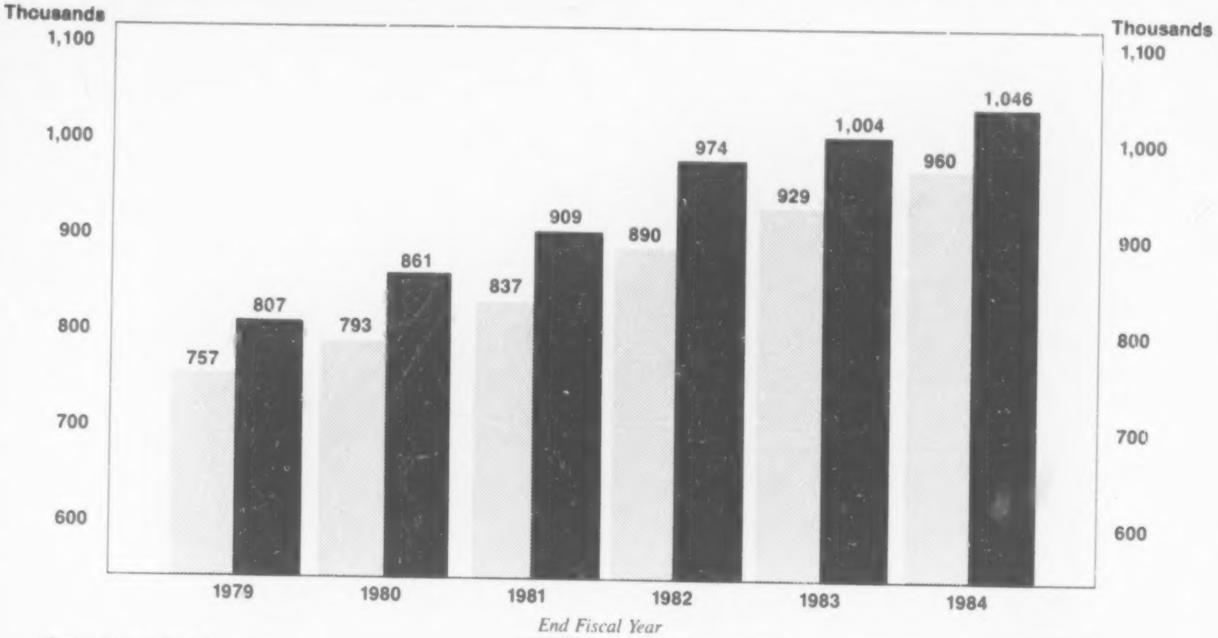
*Source:* Department of Defense, *Selected Manpower Statistics – FY 1984.*

# Distribution of Dependents by Service & Type (As of September 30, 1984)

| | **Military Personnel** | | **Dependents of Active Duty Military Personnel** | | | | | |
|---|---|---|---|---|---|---|---|---|
| Component | (Excluding Cadets) Total Number | Number of Males | Total Number (All Types) | Spouses | Children | Parents & All Other | Number/ Military Male | Number/ Family Unit |
| Total Military | 2,128,227 | 1,923,150 | 2,851,392 | 1,149,922 | 1,168,179 | 83,291 | 1.48 | 2.48 |
| Officers | 303,457 | 274,679 | 571,041 | 219,045 | 339,096 | 12,900 | 2.08 | 2.61 |
| Enlisted | 1,824,770 | 1,648,471 | 2,280,351 | 930,877 | 1,276,083 | 70,391 | 1.38 | 2.45 |
| Total Army | 776,951 | 698,748 | 1,136,587 | 409,598 | 651,865 | 75,124 | 1.63 | 2.77 |
| Officers | 107,414 | 97,653 | 206,933 | 74,523 | 121,001 | 11,409 | 2.12 | 2.78 |
| Enlisted | 669,537 | 601,095 | 929,654 | 335,075 | 530,864 | 63,715 | 1.55 | 2.77 |
| Total Navy | 560,196 | 511,333 | 646,853 | 279,715 | 363,314 | 3,824 | 1.27 | 2.31 |
| Officers | 69,380 | 62,303 | 120,239 | 48,416 | 71,350 | 473 | 1.93 | 2.48 |
| Enlisted | 490,816 | 449,030 | 526,614 | 231,299 | 291,964 | 3,351 | 1.17 | 2.28 |
| Total Marines | 195,382 | 186,989 | 198,062 | 83,752 | 113,574 | 736 | 1.06 | 2.36 |
| Officers | 20,335 | 19,718 | 39,968 | 15,164 | 24,725 | 79 | 2.03 | 2.64 |
| Enlisted | 175,027 | 167,271 | 158,094 | 68,588 | 88,849 | 657 | .95 | 2.30 |
| Total Air Force | 595,698 | 526,080 | 869,890 | 376,857 | 489,426 | 3,607 | 1.65 | 2.31 |
| Officers | 106,308 | 95,005 | 203,901 | 80,942 | 122,020 | 939 | 2.15 | 2.52 |
| Enlisted | 489,390 | 431,075 | 665,989 | 295,915 | 367,406 | 2,668 | 1.54 | 2.25 |

*Source:* Department of Defense, *Selected Manpower Statistics – FY 1984.*

## Selected Reserve Manpower Trends (End strength as of January 1, 1985)



Trained Unit End Strength ..................... ▨ Total End Strength..................... ■

*Note:* The Selected Reserve (SELRES) is the primary element of the Reserve forces organized and trained as units. The SELRES includes the Army National Guard, Army Reserve, Naval Reserve, Marine Corps Reserve, Air National Guard, and Air Force Reserve.
*Source:* Department of Defense, *Organization of the Joint Chiefs of Staff: Military Posture FY 86.*

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ALFRED M. LEWIS INCORPORATED

# 4th Annual Exchange Sales Report

The military exchange systems reported combined worldwide sales of some $13.5 billion in fiscal year 1984, contributing to a small annual sales advance of 1.54 percent.

Overall, sales certainly did not tally as high as many had originally hoped, but only the Coast Guard's resale network showed a worldwide exchange sales decline (4 percent). The Coast Guard's data also revealed a year-on CONUS-system sales retreat (6.12 percent.)

A strong U.S. dollar overseas was reportedly to blame for some military exchange ills. Millions in lost exchange sales, particularly in Germany, apparently moved off base with patrons who found they had more buying power with their bucks on the local economy.

It was the Navy's exchange system that posted the greatest worldwide percent sales gain (3.03 percent) over fiscal year 1983, on sales of some $1.5 billion. And the largest regional percent sales increase (6.46) belonged to the performance of the Marines' overseas exchange stores.

These and other facts and figures can be gleaned from this special *Interservice* report. It is hoped that the data on the pages that follow will deliver the information necessary to assist marketers in achieving even greater sales success in the future. ■

### BY ALAN GOLDSTEIN

*Alan Goldstein is director of information and research with the American Logistics Association. He's also editor of* Interservice *magazine.*

The ALA is indebted to the Army and Air Force Exchange Service (AAFES), Navy Resale and Services Support Office (NAVRESSO), Marine Corps Exchange Service (MCES), and U.S. Coast Guard (Resale Programs Division) for their invaluable cooperation and assistance with providing the data necessary for this report.

## All-Exchange Sales Summary—FY84

### Totals

| | FY 84 $ Sales | | | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Store | Retail | Services & Other | Total | | |
| AAFES (CONUS Totals) | 1,927,032,000 | 713,009,000 | 2,640,041,000 | 2,623,088,000 | 0.65% |
| AAFES (Overseas Totals) | 1,501,259,000 | 618,299,000 | 2,119,560,000 | 2,084,342,000 | 1.69% |
| AAFES (Worldwide Totals) | 3,428,291,000 | 1,331,308,000 | 4,759,601,000 | 4,707,430,000 | 1.11% |
| Navy (CONUS) | 763,095,828 | 326,489,000 | 1,090,587,871 | 1,052,212,532 | 3.65% |
| Navy (Overseas) | 318,524,171 | 99,636,333 | 414,460,527 | 408,562,392 | 1.44% |
| Navy (Worldwide Totals) | 1,081,619,999 | 426,125,333 | 1,505,048,398 | 1,460,774,924 | 3.03% |
| Marine Corps (CONUS Totals) | 328,612,401 | 20,084,590 | 348,696,991 | 342,070,887 | 1.94% |
| Marine Corps (Overseas Totals) | 52,496,052 | 6,815,388 | 59,311,440 | 55,714,020 | 6.46% |
| Marine Corps (Worldwide Totals) | 381,108,453 | 26,899,978 | 408,008,431 | 397,784,907 | 2.57% |
| Coast Guard (CONUS Totals) | 40,069,865 | 40,941,638 | 81,011,503 | 85,971,744 | −6.12% |
| Coast Guard (Overseas Totals) | 10,132,454 | 9,551,608 | 19,684,062 | 18,921,033 | 3.88% |
| Coast Guard (Worldwide Totals) | 50,592,962 | 50,629,471 | 101,222,433 | 105,358,339 | −4.00% |
| **All-Exchange Totals *** | **$9,882,834,185** | **$3,669,789,339** | **$13,547,233,656** | **$13,342,230,778** | **+1.54%** |

*** Data for Navy's NAVRESSO-managed ships store program are excluded from this report since the ships' stores follow a different calendar year operating cycle.**

# AAFES Exchange Sales—FY 84

## Summary of Sales by Retail Department ($ In Thousands)

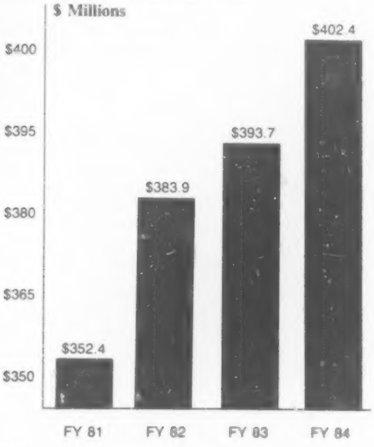
| Department/Dept. Code | Domestic |  | Overseas |  | Mail Order |  | Worldwide |  | % Change |
|---|---|---|---|---|---|---|---|---|---|
|  | Sales | % | Sales | % | Sales | % | Sales | % | 84/83 |
| Automotive/01 | 64,880 | 3.1 | 34,685 | 2.6 | 76 | .1 | 99,641 | 2.8 | +.2 |
| Beer & Sodas/23 | 111,259 | 5.3 | 72,344 | 5.4 | –0– | –0– | 183,602 | 5.2 | +23.8 |
| Boyswear/74 | 28,103 | 1.3 | 14,873 | 1.1 | –0– | –0– | 42,977 | 1.2 | +8.6 |
| Cleaning Supplies/83 | 32,806 | 1.5 | 15,890 | 1.2 | 86 | .1 | 48,782 | 1.4 | –1.9 |
| Cosmetics & Fragrances/34 | 59,946 | 2.8 | 18,909 | 1.4 | –0– | –0– | 78,855 | 2.2 | +14.1 |
| Dinnerware & Flatware/80 | 11,554 | .5 | 6,221 | .5 | 3,395 | 5.5 | 21,170 | .6 | –.7 |
| DPSC Merchandise/19 | 119,339 | 5.6 | 39,975 | 3.0 | –0– | –0– | 159,314 | 4.5 | –2.2 |
| Food & Juices/20 | 145,995 | 6.9 | 92,031 | 6.9 | 92 | .1 | 238,117 | 6.8 | –8.9 |
| Footwear/77 | 82,604 | 3.9 | 36,733 | 2.8 | 466 | .8 | 119,803 | 3.4 | +2.1 |
| Furniture & Rugs/86 | 21,814 | 1.0 | 27,755 | 2.1 | 2,433 | 3.9 | 52,002 | 1.5 | +3.1 |
| Giftware/82 | 25,452 | 1.2 | 20,008 | 1.5 | 5,872 | 9.4 | 51,333 | 1.5 | +6.0 |
| Girlswear/75 | 20,141 | .9 | 12,654 | 1.0 | 11 | –0– | 32,806 | .9 | +.6 |
| Hardware/87 | 52,867 | 2.5 | 13,259 | 1.0 | 126 | .2 | 66,252 | 1.9 | –.9 |
| Health & Beauty Aids/30 | 132,800 | 6.3 | 67,285 | 5.1 | 389 | .6 | 200,474 | 5.7 | –.6 |
| Home Entertainment/97 | 123,116 | 5.8 | 322,358 | 24.2 | 29,571 | 47.5 | 475,045 | 13.5 | +.8 |
| Infants' & Toddlers' Wear/76 | 30,905 | 1.5 | 17,534 | 1.3 | 5 | –0– | 48,445 | 1.4 | +3.8 |
| Jewelry/50 | 27,367 | 1.3 | 13,849 | 1.0 | 7,357 | 11.8 | 48,573 | 1.4 | +4.7 |
| Jewelry (Precious & Semiprecious)/56 | 24,498 | 1.2 | 18,481 | 1.4 | 1 | –0– | 42,979 | 1.2 | +19.3 |
| Kitchenware/81 | 32,379 | 1.5 | 14,545 | 1.1 | 638 | 1.0 | 47,562 | 1.4 | –.5 |
| Linens & Domestics/78 | 42,576 | 2.0 | 23,681 | 1.8 | 631 | 1.0 | 66,888 | 1.9 | +4.8 |
| Luggage/88 | 19,670 | .9 | 8,399 | .6 | 189 | .3 | 28,258 | .8 | +1.0 |
| Men's Furnishings/71 | 98,036 | 4.6 | 46,607 | 3.5 | 100 | .2 | 144,743 | 4.1 | +4.3 |
| Men's Outerwear/70 | 51,851 | 2.4 | 30,995 | 2.3 | 91 | .1 | 82,937 | 2.4 | +4.1 |
| Military Wear/40 | 47,840 | 2.3 | 11,851 | .9 | –0– | –0– | 59,690 | 1.7 | +2.6 |
| Outdoor Living/89 | 57,636 | 2.7 | 8,702 | .7 | 68 | .1 | 66,396 | 1.9 | +4.6 |
| Photo Finishing/92 | 16,252 | .8 | 2,993 | .2 | –0– | –0– | 19,245 | .6 | +5.0 |
| Photography & Optical/93 | 56,888 | 2.7 | 49,992 | 3.8 | 4,087 | 6.6 | 110,967 | 3.2 | –3.0 |
| Recorded Sound & Video/98 | 26,733 | 1.3 | 37,218 | 2.8 | 549 | .9 | 64,501 | 1.8 | –1.0 |
| Sporting Goods & Camping Supplies/91 | 40,264 | 1.9 | 15,467 | 1.2 | 1,243 | 2.0 | 56,974 | 1.6 | +1.8 |
| Stationery/60 | 119,408 | 5.6 | 45,731 | 3.4 | 980 | 1.6 | 116,119 | 4.7 | +1.6 |
| Tobacco Products/10 | 105,013 | 5.0 | 31,214 | 2.3 | 37 | .1 | 136,264 | 3.9 | –2.7 |
| Toys, Games & Bicycles/95 | 43,671 | 2.1 | 33,910 | 2.5 | 927 | 1.5 | 78,509 | 2.2 | +11.3 |
| Traffic & Major Appliances/85 | 72,072 | 3.4 | 42,775 | 3.2 | 1,452 | 2.3 | 116,298 | 3.3 | +2.7 |
| Watches/51 | 24,063 | 1.1 | 11,749 | .9 | (3) | –0– | 35,809 | 1.0 | –.2 |
| Women's Furnishings/73 | 60,102 | 2.8 | 19,280 | 1.4 | 602 | 1.0 | 79,983 | 2.3 | +1.4 |
| Women's Outerwear/72 | 72,592 | 3.4 | 39,432 | 3.0 | 338 | .5 | 112,362 | 3.2 | +5.2 |
| Yardage & Sewing Notions/79 | 18,526 | .9 | 12,079 | .9 | 487 | .8 | 31,093 | .9 | –8.7 |
| **Retail Department Totals** | **$2,121,008** | **100.0%** | **$1,331,464** | **100.0%** | **$62,296** | **100.0%** | **$3,514,768** | **100.0%** | +2.0 |

# AAFES Exchange Sales—FY 84 (Continental U.S.)

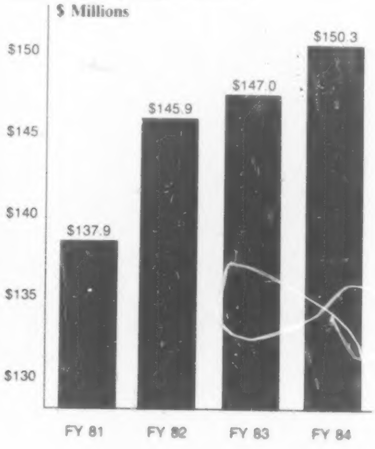
## Alamo Region (ALER)

| Store | FY 84 $ Sales<br>Retail | <br>Services & Other | <br>Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Altus AFB, OK | 4,601,000 | 1,528,000 | 6,129,000 | 5,849,000 | 4.79% |
| Barksdale AFB, LA | 17,882,000 | 4,911,000 | 22,793,000 | 22,126,000 | 2.93% |
| Bergstrom AFB, TX | 15,228,000 | 3,595,000 | 18,823,000 | 18,713,000 | 0.58% |
| Blytheville AFB, AR | 5,047,000 | 1,636,000 | 6,683,000 | 6,492,000 | 2.86% |
| Brooks AFB, TX | 1,871,000 | 973,000 | 2,844,000 | 2,858,000 | −0.49% |
| Cannon AFB, NM | 5,877,000 | 2,359,000 | 8,236,000 | 8,971,000 | −8.92% |
| Carswell AFB, TX | 24,887,000 | 5,819,000 | 30,706,000 | 29,197,000 | 4.91% |
| Dyess AFB, TX | 7,830,000 | 2,933,000 | 10,763,000 | 10,511,000 | 2.34% |
| England AFB, LA | 5,956,000 | 1,915,000 | 7,871,000 | 8,582,000 | −9.03% |
| Fort Bliss, TX | 33,492,000 | 14,226,000 | 47,718,000 | 46,339,000 | 2.89% |
| Fort Chaffee, AR | 2,293,000 | 273,000 | 2,566,000 | 2,786,000 | −8.57% |
| Fort Hood, TX | 50,077,000 | 24,274,000 | 74,351,000 | 72,386,000 | 2.64% |
| Fort Polk, LA | 22,736,000 | 11,093,000 | 33,829,000 | 33,313,000 | 1.53% |
| Fort Sam Houston, TX | 39,064,000 | 8,482,000 | 47,546,000 | 47,603,000 | −0.12% |
| Fort Sill, OK | 24,351,000 | 13,450,000 | 37,801,000 | 34,799,000 | 7.94% |
| Good Fellow AFB, TX | 3,972,000 | 1,354,000 | 5,326,000 | 5,623,000 | −5.58% |
| Holloman AFB, NM | 7,390,000 | 3,401,000 | 10,791,000 | 10,453,000 | 3.13% |
| Kirtland AFB, NM | 14,124,000 | 3,818,000 | 17,942,000 | 17,623,000 | 1.78% |
| Lackland AFB, TX | 42,713,000 | 17,777,000 | 60,490,000 | 58,891,000 | 2.64% |
| Laughlin AFB, TX | 3,016,000 | 1,496,000 | 4,512,000 | 4,831,000 | −7.07% |
| Little Rock AFB, AR | 13,226,000 | 4,389,000 | 17,615,000 | 17,711,000 | −0.54% |
| Randolph AFB, TX | 16,182,000 | 4,899,000 | 21,081,000 | 21,526,000 | −2.11% |
| Reese AFB, TX | 4,048,000 | 1,488,000 | 5,536,000 | 5,526,000 | 0.18% |
| Sheppard AFB, TX | 17,014,000 | 6,988,000 | 24,002,000 | 21,722,000 | 9.50% |
| Tinker AFB, OK | 15,105,000 | 4,339,000 | 19,444,000 | 19,141,000 | 1.56% |
| Vance AFB, OK | 2,179,000 | 805,000 | 2,984,000 | 2,874,000 | 3.69% |
| White Sands, NM | 2,219,000 | 2,062,000 | 4,281,000 | 4,258,000 | 0.54% |
| **ALER Totals** | **$402,381,000** | **$150,283,000** | **$552,664,000** | **$540,704,000** | **+2.21%** |

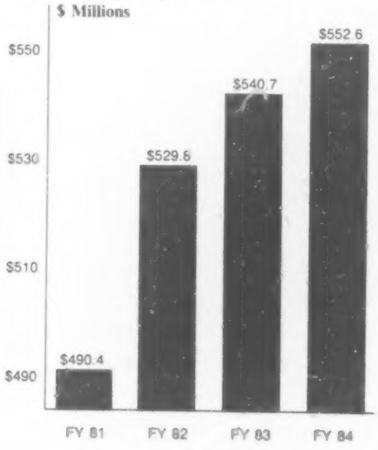
**4-Year Retail Sales Summary**
**Alamo Exchange Region (AAFES)**



**4-Year Services Sales Summary**
**Alamo Exchange Region (AAFES)**



**4-Year Total Sales Summary**
**Alamo Exchange Region (AAFES)**

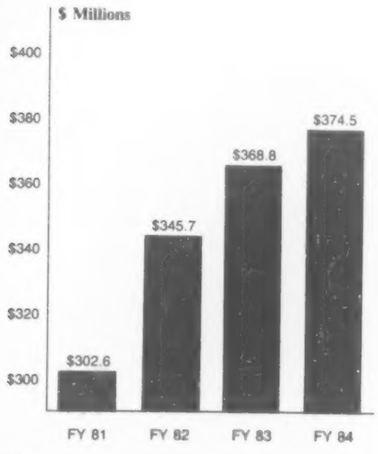


# AAFES Exchange Sales—FY 84

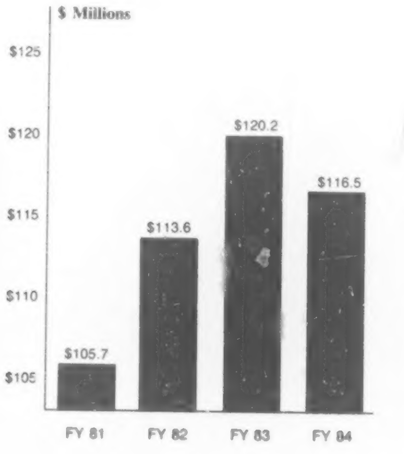
## Capitol Region (CPER)

| Store | FY 84 $ Sales<br>Retail | <br>Services & Other | <br>Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Aberdeen Proving Grounds, MD | 11,964,000 | 4,220,000 | 16,184,000 | 15,638,000 | 3.37% |
| Andrews AFB, D.C. | 29,751,000 | 8,280,000 | 38,031,000 | 36,928,000 | 2.90% |
| Bolling AFB, D.C. | 15,525,000 | 5,337,000 | 20,862,000 | 19,681,000 | 5.66% |
| Cameron Station, VA | 22,622,000 | 2,961,000 | 25,583,000 | 24,606,000 | 3.82% |
| Carlisle Barracks, PA | 11,383,000 | 2,020,000 | 13,403,000 | 13,390,000 | 0.10% |
| Dover AFB, DE | 9,258,000 | 3,661,000 | 12,919,000 | 13,481,000 | −4.35% |
| Fort Belvoir, VA | 29,434,000 | 10,406,000 | 39,840,000 | 37,535,000 | 5.79% |
| Fort Devens, MA | 25,172,000 | 7,452,000 | 32,624,000 | 31,571,000 | 3.23% |
| Fort Dix, NJ | 41,274,000 | 12,363,000 | 53,637,000 | 56,720,000 | −5.75% |
| Fort Drum, NY | 7,496,000 | 1,746,000 | 9,242,000 | 8,401,000 | 9.10% |
| Fort Eustis, VA | 15,871,000 | 6,753,000 | 22,624,000 | 22,017,000 | 2.68% |
| Fort Hamilton, NY | 8,684,000 | 1,732,000 | 10,416,000 | 10,760,000 | −3.30% |
| Fort Lee, VA | 19,166,000 | 8,622,000 | 27,788,000 | 26,970,000 | 2.94% |
| Fort Meade, MD | 27,008,000 | 7,320,000 | 34,328,000 | 34,536,000 | −0.61% |
| Fort Monmouth, NJ | 7,792,000 | 2,050,000 | 9,842,000 | 10,132,000 | −2.95% |
| Fort Myer/Fort McNair, VA | 13,335,000 | 6,302,000 | 19,637,000 | 18,032,000 | 8.17% |
| Griffiss AFB, NY | 10,829,000 | 3,161,000 | 13,990,000 | 14,972,000 | −7.02% |
| Langley AFB, VA | 19,913,000 | 8,234,000 | 28,147,000 | 28,842,000 | −2.47% |
| Loring AFB, ME | 4,534,000 | 2,229,000 | 6,763,000 | 6,808,000 | −0.67% |
| Pease AFB, NH | 12,859,000 | 2,648,000 | 15,507,000 | 14,430,000 | 6.95% |
| Plattsburgh AFB, NY | 6,534,000 | 2,125,000 | 8,659,000 | 8,498,000 | 1.86% |
| U.S. Military Academy, NY | 8,973,000 | 3,068,000 | 12,041,000 | 11,969,000 | 0.60% |
| Walter Reed AMC, D.C. | 6,221,000 | 3,450,000 | 9,671,000 | 11,782,000 | −21.83% |
| Westover AFB, MA | 8,865,000 | 407,000 | 9,272,000 | 9,345,000 | −0.79% |
| **CPER Totals** | **$374,463,000** | **$116,547,000** | **$491,010,000** | **$487,044,000** | **+0.81%** |

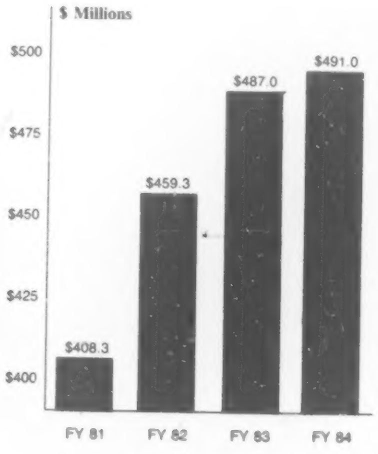
**4-Year Retail Sales Summary**
**Capitol Exchange Region (AAFES)**



**4-Year Services Sales Summary**
**Capitol Exchange Region (AAFES)**



**4-Year Total Sales Summary**
**Capitol Exchange Region (AAFES)**

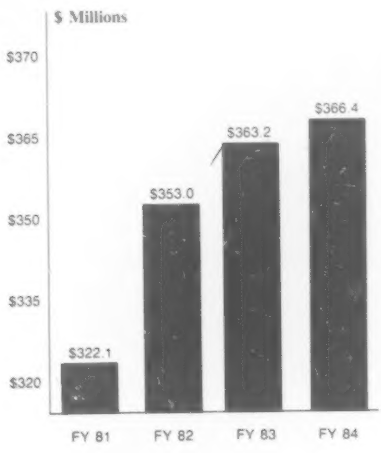


# AAFES Exchange Sales—FY 84

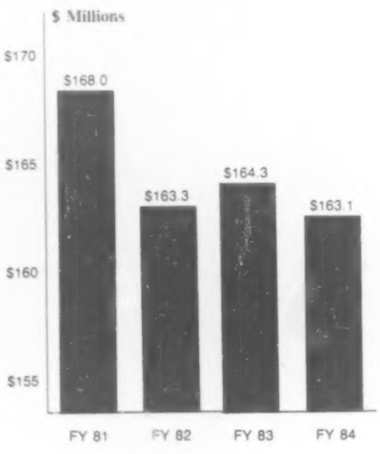
## Golden Gate Region (GGER)

| Store | FY 84 $ Sales |  |  | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
|  | Retail | Services & Other | Total |  |  |
| Beale AFB, CA | 8,681,000 | 4,487,000 | 13,168,000 | 13,288,000 | −0.90% |
| Castle AFB, CA | 9,893,000 | 3,851,000 | 13,744,000 | 13,809,000 | −0.47% |
| Davis-Monthan AFB, AZ | 14,723,000 | 4,191,000 | 18,914,000 | 19,238,000 | −1.68% |
| Edwards AFB, CA | 9,352,000 | 6,077,000 | 15,429,000 | 13,561,000 | 13.77% |
| Fairchild AFB, WA | 10,376,000 | 2,811,000 | 13,187,000 | 13,527,000 | −2.51% |
| Fort Huachuca, AZ | 11,470,000 | 4,967,000 | 16,437,000 | 16,209,000 | 1.41% |
| Fort Hunter Liggett, CA | 2,212,000 | 1,395,000 | 3,607,000 | 3,499,000 | 3.09% |
| Fort Irwin, CA | 4,941,000 | 2,552,000 | 7,493,000 | 6,914,000 | 8.37% |
| Fort Lewis, WA | 67,561,000 | 30,596,000 | 98,157,000 | 100,548,000 | −2.38% |
| Fort Ord, CA | 33,922,000 | 19,926,000 | 53,848,000 | 51,108,000 | 5.36% |
| George AFB, CA | 8,761,000 | 4,425,000 | 13,186,000 | 13,312,000 | −0.95% |
| Hill AFB, UT | 12,253,000 | 3,195,000 | 15,448,000 | 13,775,000 | 12.15% |
| Los Angeles AFS, CA | 12,901,000 | 3,552,000 | 16,453,000 | 8,831,000 | 86.31% |
| Luke AFB, AZ | 20,780,000 | 6,695,000 | 27,475,000 | 16,948,000 | 62.11% |
| Malmstrom AFB, MT | 4,984,000 | 1,876,000 | 6,860,000 | 7,278,000 | 0.00% |
| Mather AFB, CA | 29,231,000 | 10,641,000 | 39,872,000 | 26,343,000 | 51.36% |
| Mountain Home AFB, ID | 7,493,000 | 2,526,000 | 10,019,000 | 9,843,000 | 1.79% |
| Nellis AFB, NV | 16,929,000 | 6,608,000 | 23,537,000 | 23,383,000 | 0.66% |
| Norton AFB, CA | 27,416,000 | 13,784,000 | 41,200,000 | 22,401,000 | 83.92% |
| Presidio of San Francisco, CA | 18,704,000 | 8,722,000 | 27,426,000 | 28,113,000 | 0.00% |
| Travis AFB, CA | 21,375,000 | 10,960,000 | 32,335,000 | 33,966,000 | 0.00% |
| Vandenberg AFB, CA | 12,032,000 | 8,574,000 | 20,606,000 | 19,070,000 | 8.05% |
| Yuma Proving Ground, AZ | 411,000 | 751,000 | 1,162,000 | 1,161,000 | 0.09% |
| **GGER Totals** | **$366,401,000** | **$163,162,000** | **$529,563,000** | **$476,125,000** | **+11.22%** |

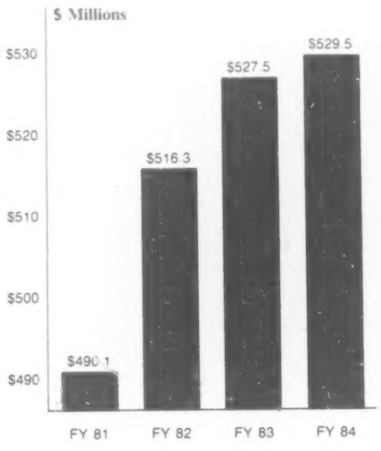
4-Year Retail Sales Summary
Golden Gate Exchange Region (AAFES)



4-Year Services Sales Summary
Golden Gate Exchange Region (AAFES)



4-Year Total Sales Summary
Golden Gate Exchange Region (AAFES)

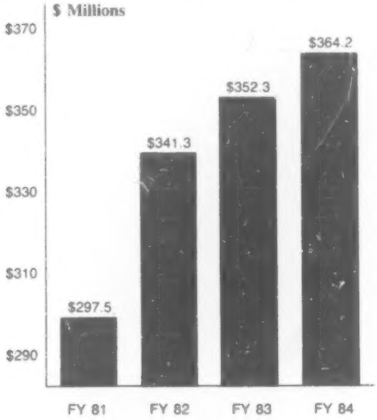


# AAFES Exchange Sales—FY 84

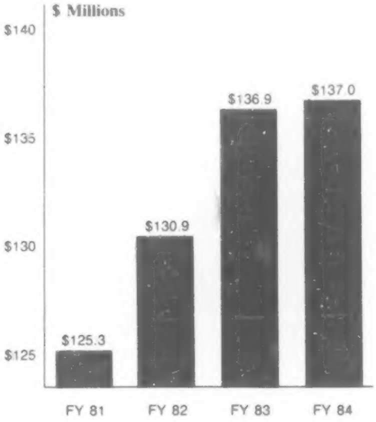
## Ohio Valley Region (OVER)

| Store | FY 84 $ Sales Retail | FY 84 $ Sales Services & Other | FY 84 $ Sales Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Chanute AFB, IL | 13,608,000 | 6,368,000 | 19,976,000 | 18,396,000 | 8.59% |
| Denver Exchange (Lowry AFB), CO | 29,448,000 | 8,731,000 | 38,179,000 | 37,451,000 | 1.94% |
| Ellsworth AFB, SD | 6,696,000 | 2,795,000 | 9,491,000 | 9,247,000 | 2.64% |
| Fort Benjamin Harrison, IN | 11,798,000 | 4,173,000 | 15,971,000 | 15,343,000 | 4.09% |
| Fort Campbell, KY | 31,464,000 | 14,069,000 | 45,533,000 | 44,552,000 | 2.20% |
| Fort Carson, CO | 19,517,000 | 10,642,000 | 30,159,000 | 28,510,000 | 5.78% |
| Fort Knox, KY | 32,134,000 | 16,076,000 | 48,210,000 | 48,401,000 | −0.39% |
| Fort Leavenworth, KS | 9,395,000 | 3,040,000 | 12,435,000 | 11,659,000 | 6.66% |
| Fort Leonard Wood, MO | 21,165,000 | 11,378,000 | 32,543,000 | 31,668,000 | 2.76% |
| Fort McCoy, WI | 10,327,000 | 1,011,000 | 11,338,000 | 11,740,000 | −3.42% |
| Fort Riley,KS | 17,534,000 | 10,497,000 | 28,031,000 | 29,007,000 | −3.36% |
| Fort Sheridan, IL | 7,186,000 | 1,110,000 | 8,296,000 | 8,767,000 | −5.37% |
| Francis E. Warren AFB, WY | 3,965,000 | 1,645,000 | 5,610,000 | 5,447,000 | 2.99% |
| Grand Forks AFB, ND | 10,097,000 | 3,821,000 | 13,918,000 | 13,789,000 | 0.94% |
| Grissom AFB, IN | 4,358,000 | 2,254,000 | 6,612,000 | 6,316,000 | 4.69% |
| K.I. Sawyer AFB, MI | 6,020,000 | 3,261,000 | 9,281,000 | 9,295,000 | −0.15% |
| McConnell AFB, KS | 5,398,000 | 1,912,000 | 7,310,000 | 7,100,000 | 2.96% |
| Minot AFB, ND | 8,049,000 | 4,118,000 | 12,167,000 | 11,717,000 | 3.84% |
| Nashville (Tullahoma), TN | 4,026,000 | 6,000 | 4,032,000 | 3,998,000 | 0.85% |
| Oakdale ADS, PA | 4,789,000 | 168,000 | 4,957,000 | 5,044,000 | −1.72% |
| Offutt AFB, NE | 19,938,000 | 6,559,000 | 26,497,000 | 26,666,000 | −0.63% |
| Peterson Field (Colo. Springs), CO | 20,153,000 | 6,333,000 | 26,486,000 | 24,488,000 | 8.16% |
| Rickenbacker AFB, OH | 5,180,000 | 540,000 | 5,720,000 | 6,705,000 | −14.69% |
| Scott AFB, IL | 19,846,000 | 7,175,000 | 27,021,000 | 25,288,000 | 6.85% |
| Selfridge ANG, MI | 7,348,000 | 1,326,000 | 8,674,000 | 7,323,000 | 18.45% |
| Whiteman AFB, MO | 5,374,000 | 1,698,000 | 7,072,000 | 7,136,000 | −0.90% |
| Wright-Patterson AFB, OH | 21,814,000 | 4,449,000 | 26,263,000 | 25,220,000 | 4.14% |
| Wurtsmith AFB, MI | 7,630,000 | 1,855,000 | 9,485,000 | 8,881,000 | 6.80% |
| **OVER Totals** | **$364,257,000** | **$137,010,000** | **$501,267,000** | **$489,154,000** | **+2.48%** |

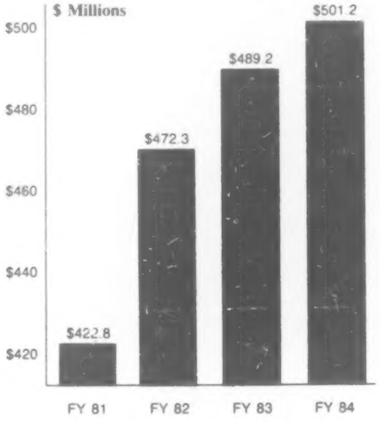
**4-Year Retail Summary**
**Ohio Valley Exchange Region (AAFES)**



**4-Year Total Sales Summary**
**Ohio Valley Exchange Region (AAFES)**



**4-Year Services Sales Summary**
**Ohio Valley Exchange Region (AAFES)**

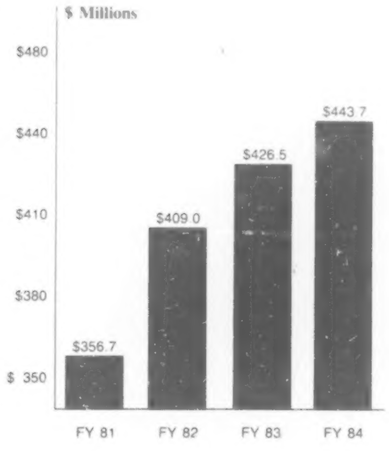


# AAFES Exchange Sales—FY 84

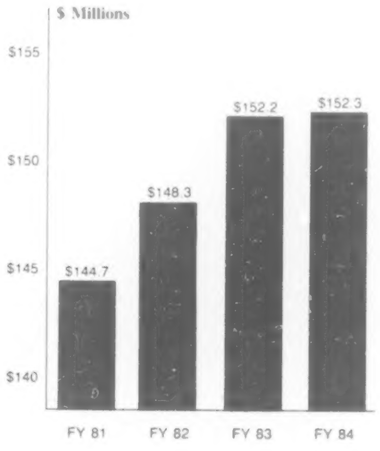
## Southeast Region (SEER)

| Store | FY 84 $ Sales<br>Retail | <br>Services & Other | <br>Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Charleston AFB, SC | 10,904,000 | 3,029,000 | 13,933,000 | 12,664,000 | 10.02% |
| Columbus AFB, MS | 4,521,000 | 1,837,000 | 6,358,000 | 6,232,000 | 2.02% |
| Eglin AFB, FL | 21,420,000 | 8,521,000 | 29,941,000 | 29,740,000 | 0.68% |
| Fort Benning, GA | 42,200,000 | 18,573,000 | 60,773,000 | 59,497,000 | 2.14% |
| Fort Bragg, NC | 48,972,000 | 24,773,000 | 73,745,000 | 71,486,000 | 3.16% |
| Fort Gordon, GA | 22,593,000 | 12,829,000 | 35,422,000 | 33,350,000 | 6.21% |
| Fort Jackson, SC | 34,248,000 | 7,717,000 | 41,965,000 | 43,462,000 | −3.44% |
| Fort McClellan, AL | 20,270,000 | 6,240,000 | 26,510,000 | 24,398,000 | 8.66% |
| Fort McPherson, GA | 15,101,000 | 2,825,000 | 17,926,000 | 17,278,000 | 3.75% |
| Fort Rucker, AL | 15,566,000 | 6,227,000 | 21,793,000 | 21,994,000 | −0.91% |
| Fort Stewart, GA | 24,795,000 | 8,873,000 | 33,668,000 | 31,970,000 | 5.31% |
| Homestead AFB, FL | 17,117,000 | 4,720,000 | 21,837,000 | 22,173,000 | −1.52% |
| Hurlburt Field, FL | 3,991,000 | 1,517,000 | 5,508,000 | 4,001,000 | 37.67% |
| Keesler AFB, MS | 30,988,000 | 9,523,000 | 40,511,000 | 41,331,000 | −1.98% |
| MacDill AFB, FL | 26,495,000 | 6,382,000 | 32,877,000 | 33,425,000 | −1.64% |
| Maxwell AFB, AL | 19,230,000 | 5,294,000 | 24,524,000 | 23,477,000 | 4.46% |
| Moody AFB, GA | 5,067,000 | 1,833,000 | 6,900,000 | 6,830,000 | 1.02% |
| Myrtle Beach AFB, SC | 8,070,000 | 2,687,000 | 10,757,000 | 9,906,000 | 8.59% |
| Patrick AFB, FL | 18,732,000 | 3,483,000 | 22,215,000 | 21,037,000 | 5.60% |
| Redstone Arsenal, AL | 13,975,000 | 3,189,000 | 17,164,000 | 15,233,000 | 12.68% |
| Robins AFB, GA | 10,838,000 | 2,670,000 | 13,508,000 | 13,282,000 | 1.70% |
| Seymour Johnson AFB, NC | 8,049,000 | 2,701,000 | 10,750,000 | 10,166,000 | 5.74% |
| Shaw AFB, SC | 10,940,000 | 3,325,000 | 14,265,000 | 12,846,000 | 11.05% |
| Tyndall AFB, FL | 9,627,000 | 3,578,000 | 13,205,000 | 12,905,000 | 2.32% |
| **SEER Totals** | **$443,709,000** | **$152,346,000** | **$596,055,000** | **$578,683,000** | **+3.00%** |

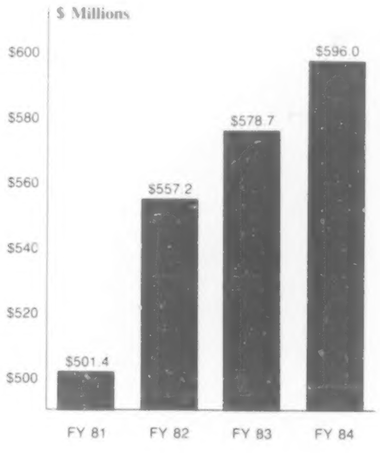
**4-Year Retail Sales Summary**
**Southeast Exchange Region (AAFES)**



**4-Year Services Sales Summary**
**Southeast Exchange Region (AAFES)**



**4-Year Total Sales Summary**
**Southeast Exchange Region (AAFES)**



# AAFES Exchange Sales—FY 84

### Totals

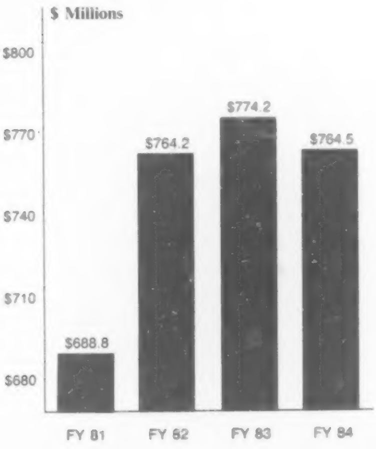
| | FY 84 $ Sales | | | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| **CONUS Totals** | **$1,927,032,000** | **$713,009,000** | **2,640,041,000** | **$2,623,088,000** | **+0.65%** |

## Europe

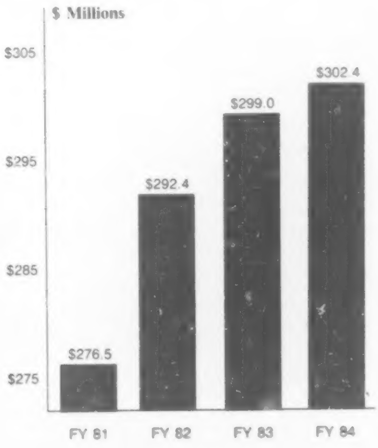
### Germany

| Exchange Area | FY 84 $ Sales | | | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| Frankfurt Area (FRAX) | 202,777,000 | 79,765,000 | 282,542,000 | 283,974,000 | −0.50% |
| Kaiserslauten Area (KAAX) | 168,041,000 | 65,657,000 | 233,698,000 | 238,714,000 | −2.10% |
| Nuremberg Area (NUAX) | 134,442,000 | 57,956,000 | 192,398,000 | 196,251,000 | −1.96% |
| Spangdahlem Area (SAAX) | 119,321,000 | 38,893,000 | 158,214,000 | 154,936,000 | 2.12% |
| Stuttgart Area (SGAX) | 139,936,000 | 60,184,000 | 200,120,000 | 199,363,000 | 0.38% |
| **Germany Exchanges' Totals** | **$764,517,000** | **$302,455,000** | **$1,066,972,000** | **$1,073,238,000** | **−0.58%** |

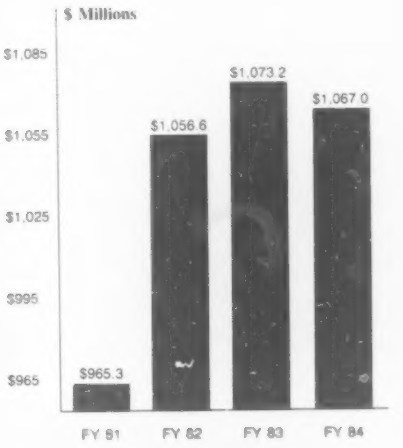
**4-Year Retail Sales Summary**
**Germany Exchanges (AAFES)**



**4-Year Services Sales Summary**
**Germany Exchanges (AAFES)**



**4-Year Total Sales Summary**
**Germany Exchanges (AAFES)**



### Germany—Other

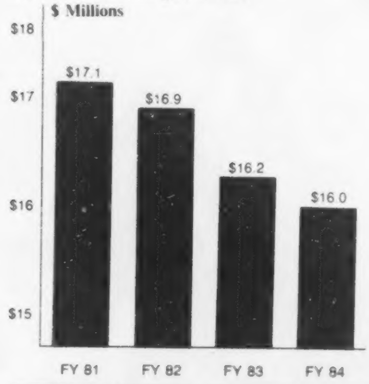
| | FY 84 $ Sales | | | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| Giessen Depot | $92,000 | −0− | $92,000 | $61,000 | +50.82% |
| Gruenstadt Depot | $1,835,000 | −0− | $1,835,000 | $1,937,000 | −5.27% |

### Greece

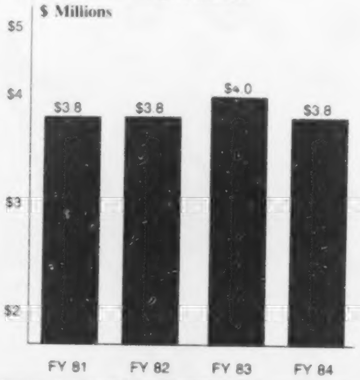
| Exchange Area | FY 84 $ Sales | | | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| Greece Area Exchange (GRAX) | $16,011,000 | $3,814,000 | $19,825,000 | $20,219,000 | −1.95% |

# AAFES Exchange Sales—FY 84

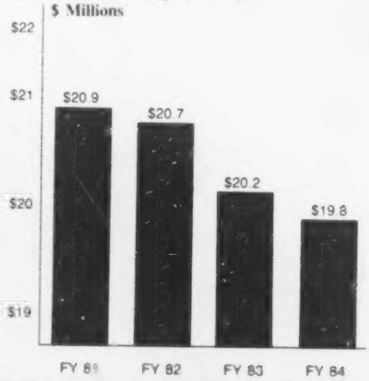
**4-Year Retail Sales Summary**
**Greece Area Exchange (AAFES)**



**4-Year Services Sales Summary**
**Greece Area Exchange (AAFES)**



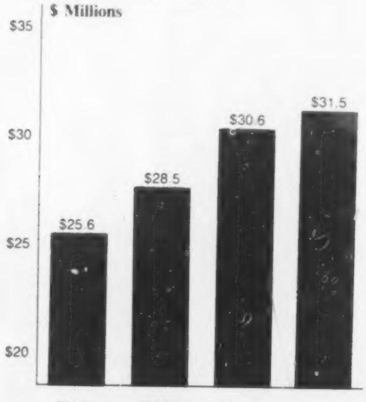
**4-Year Total Sales Summary**
**Greece Area Exchange (AAFES)**



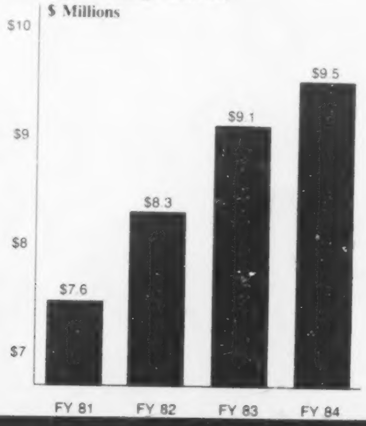
## Italy

| Exchange Area | FY 84 $ Sales<br>Retail | Services & Other | Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Italy Area (ITAX) | $31,484,000 | $9,531,000 | $41,015,000 | $39,734,000 | +3.22% |

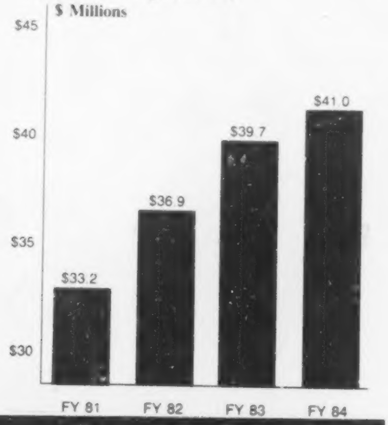
**4-Year Retail Sales Summary**
**Italy Area Exchange (AAFES)**



**4-Year Services Sales Summary**
**Italy Area Exchange (AAFES)**



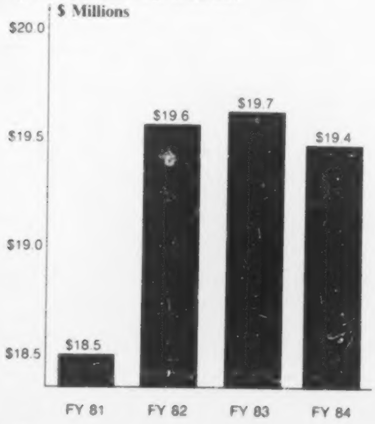
**4-Year Total Sales Summary**
**Italy Area Exchange (AAFES)**



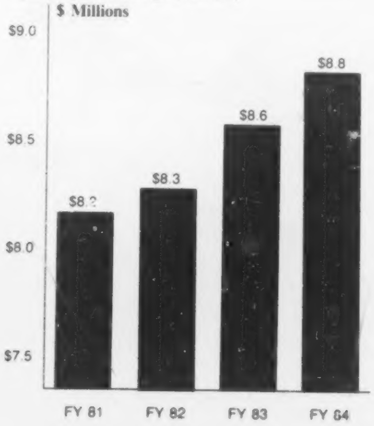
## Spain

| Exchange Area | FY 84 $ Sales<br>Retail | Services & Other | Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Spain Area (SPAX) | $19,386,000 | $8,843,000 | $28,229,000 | $28,327,000 | −0.35% |

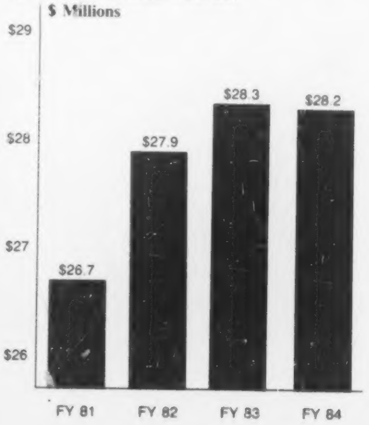
**4-Year Retail Sales Summary**
**Spain Area Exchange (AAFES)**



**4-Year Total Sales Summary**
**Spain Area Exchange (AAFES)**



**4-Year Services Sales Summary**
**Spain Area Exchange (AAFES)**

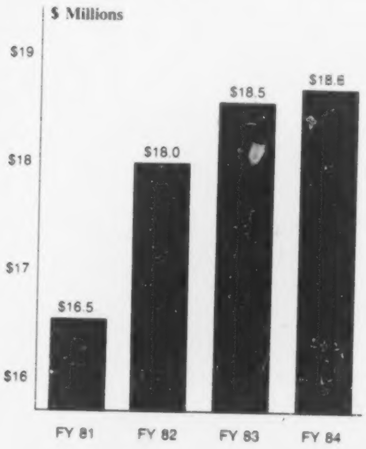


# AAFES Exchange Sales—FY 84

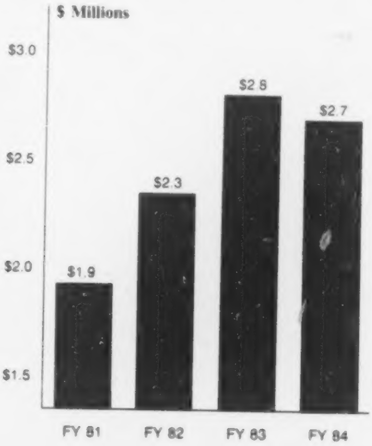
## Turkey

| Exchange Area | FY 84 $ Sales |  |  | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
|  | Retail | Services & Other | Total |  |  |
| Turkey Area (TUAX) | $18,644,000 | $2,695,000 | $21,339,000 | $20,997,000 | +1.63% |

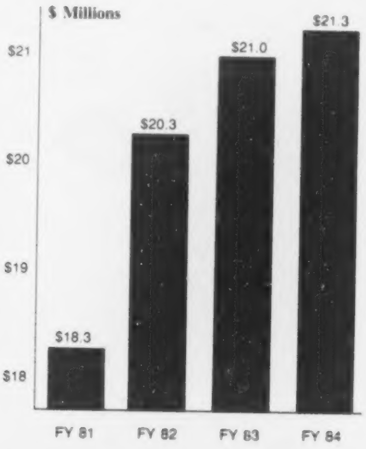
**4-Year Retail Sales Summary**
**Turkey Area Exchange (AAFES)**



**4-Year Services Sales Summary**
**Turkey Area Exchange (AAFES)**



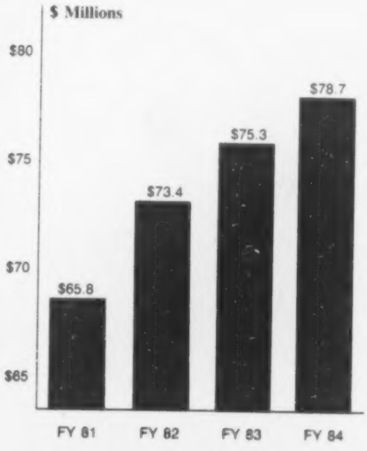
**4-Year Total Sales Summary**
**Turkey Area Exchange (AAFES)**



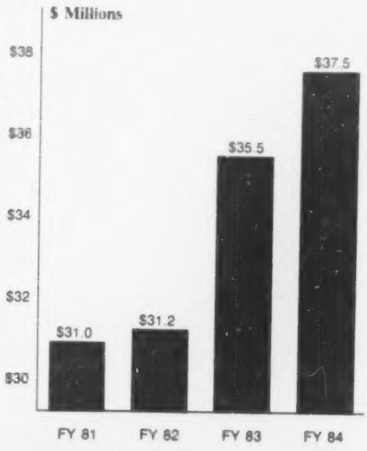
## United Kingdom

| Exchange Area | FY 84 $ Sales |  |  | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
|  | Retail | Services & Other | Total |  |  |
| United Kingdom Area (UKAX) | $78,665,000 | $37,471,000 | $116,136,000 | $110,727,000 | +4.88% |

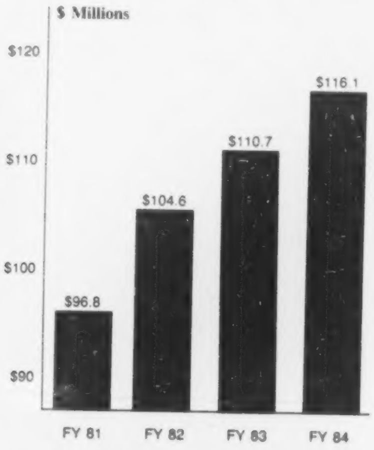
**4-Year Retail Sales Summary**
**U.K. Area Exchange (AAFES)**



**4-Year Services Sales Summary**
**U.K. Area Exchange (AAFES)**



**4-Year Total Sales Summary**
**U.K. Area Exchange (AAFES)**



## Totals

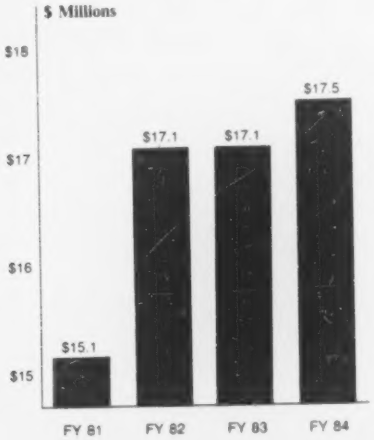
|  | FY 84 $ Sales |  |  | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
|  | Retail | Services & Other | Total |  |  |
| **AAFES-Europe Totals** | $930,634,000 | $364,809,000 | $1,295,443,000 | $1,295,240,000 | +0.02% |

# AAFES Exchange Sales—FY 84 (Pacific)

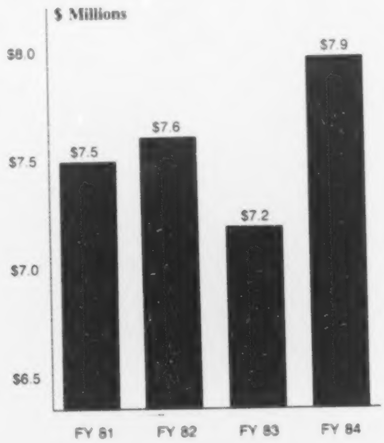
## Guam

| Exchange Area | FY 84 $ Sales Retail | FY 84 $ Sales Services & Other | FY 84 $ Sales Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Guam Area (GUAX) | $17,554,000 | $7,954,000 | $25,508,000 | $24,260,000 | +5.14% |

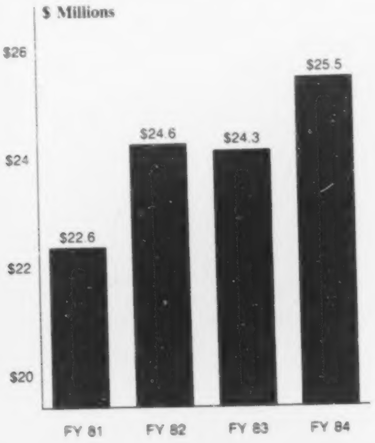
**4-Year Retail Sales Summary Guam Area Exchange (AAFES)**



**4-Year Services Sales Summary Guam Area Exchange (AAFES)**



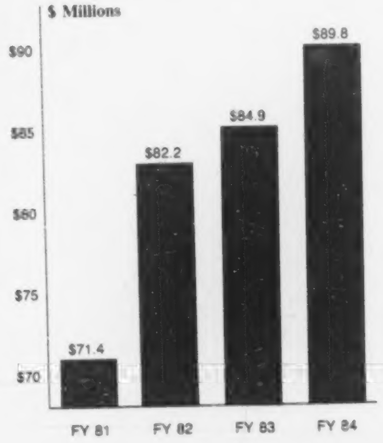
**4-Year Total Sales Summary Guam Area Exchange (AAFES)**



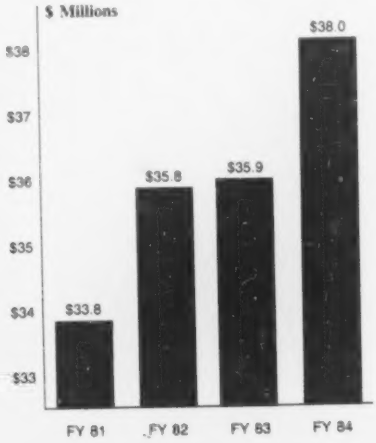
## Hawaii

| Exchange Area | FY 84 $ Sales Retail | FY 84 $ Sales Services & Other | FY 84 $ Sales Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Hawaii Area (HAAX) | $89,812,000 | $38,043,000 | $127,855,000 | $120,875,000 | +5.77% |

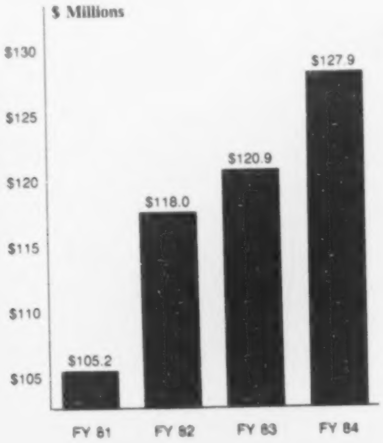
**4-Year Retail Sales Summary Hawaii Area Exchange (AAFES)**



**4-Year Services Sales Summary Hawaii Area Exchange (AAFES)**



**4-Year Total Sales Summary Hawaii Area Exchange (AAFES)**

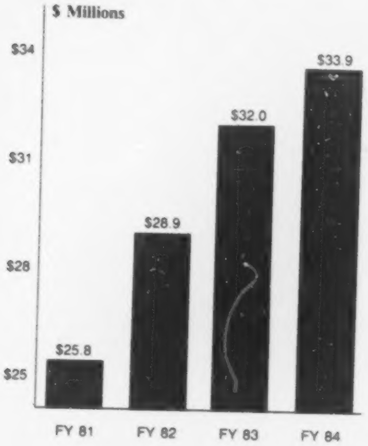


## Japan

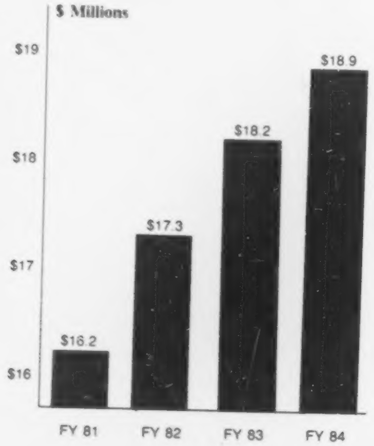
| Exchange Area | FY 84 $ Sales Retail | FY 84 $ Sales Services & Other | FY 84 $ Sales Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Japan Area (JAAX) | $33,953,000 | $18,946,000 | $52,899,000 | $50,191,000 | +5.40% |

# AAFES Exchange Sales—FY 84

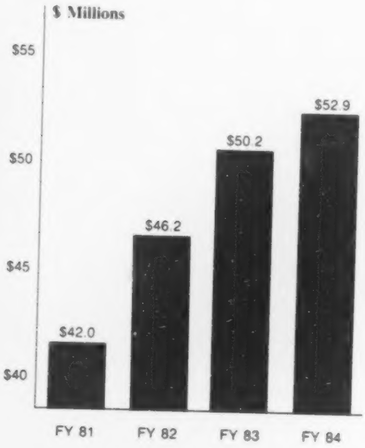
**4-Year Retail Sales Summary**
**Japan Area Exchange (AAFES)**



**4-Year Services Sales Summary**
**Japan Area Exchange (AAFES)**



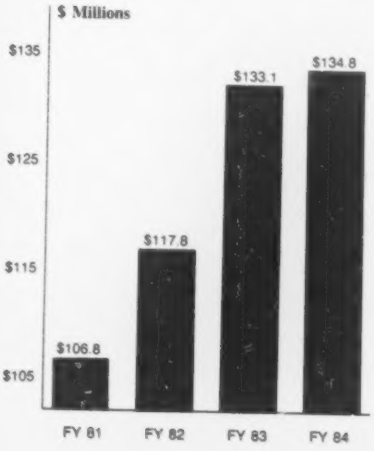
**4-Year Total Sales Summary**
**Japan Area Exchange (AAFES)**



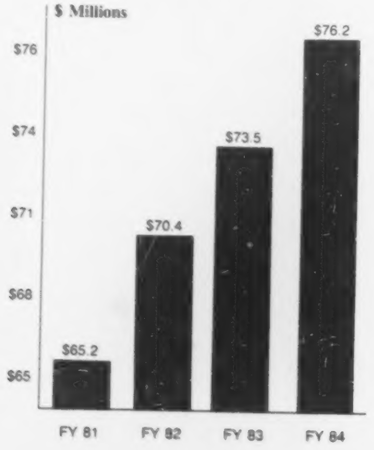
## Korea

| Exchange Area | FY 84 $ Sales Retail | FY 84 $ Sales Services & Other | FY 84 $ Sales Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Korea Area (KOAX) | $134,798,000 | $76,212,000 | $211,010,000 | $206,577,000 | +2.15% |

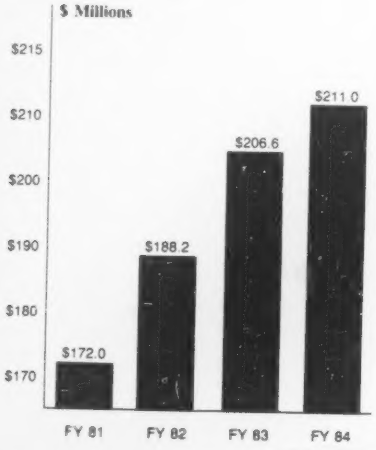
**4-Year Retail Sales Summary**
**Korea Area Exchange (AAFES)**



**4-Year Services Sales Summary**
**Korea Area Exchange (AAFES)**



**4-Year Total Sales Summary**
**Korea Area Exchange (AAFES)**

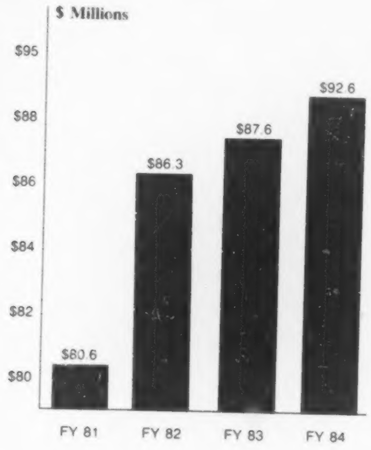


## Okinawa

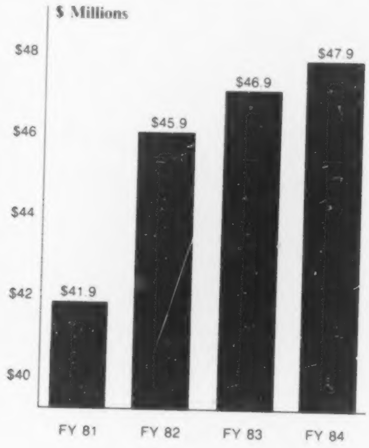
| Exchange Area | FY 84 $ Sales Retail | FY 84 $ Sales Services & Other | FY 84 $ Sales Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Okinawa Area | $92,557,000 | $47,857,000 | $140,414,000 | $134,468,000 | +4.42% |

# AAFES Exchange Sales—FY 84

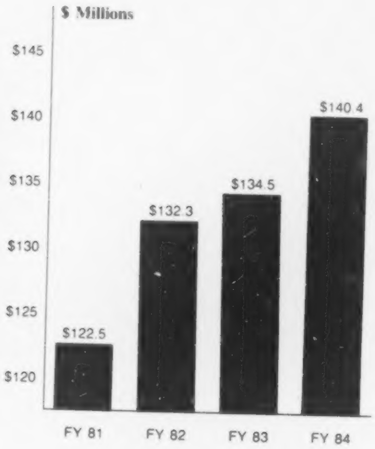
**4-Year Retail Sales Summary**
**Okinawa Area Exchange (AAFES)**



**4-Year Services Sales Summary**
**Okinawa Area Exchange (AAFES)**



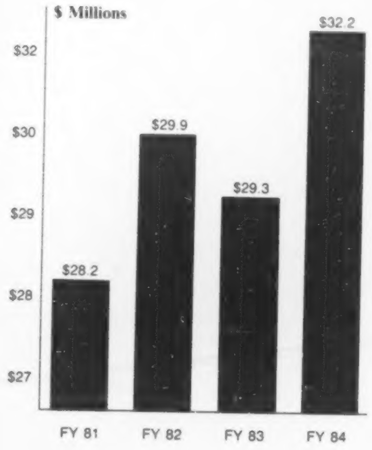
**4-Year Total Sales Summary**
**Okinawa Area Exchange (AAFES)**



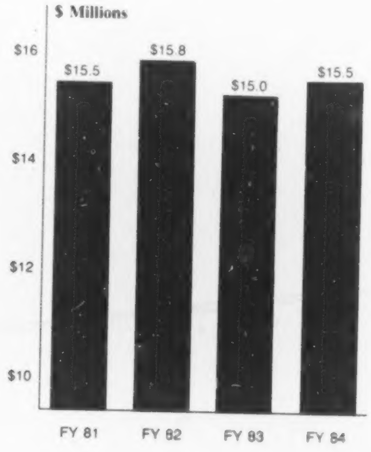
## Philippines

| Exchange Area | FY 84 $ Sales Retail | FY 84 $ Sales Services & Other | FY 84 $ Sales Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Philippines Area (PHAX) | $32,157,000 | $15,502,000 | $47,659,000 | $44,300,000 | +7.58% |

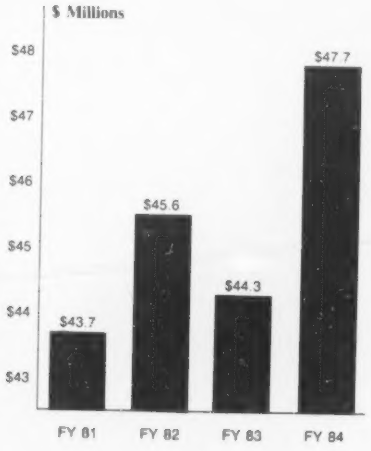
**4-Year Retail Sales Summary**
**Philippines Area Exchange (AAFES)**



**4-Year Services Sales Summary**
**Philippines Area Exchange (AAFES)**



**4-Year Total Sales Summary**
**Philippines Area Exchange (AAFES)**



## Totals

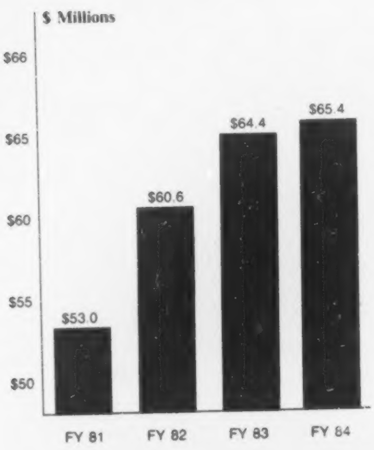
| | FY 84 $ Sales Retail | FY 84 $ Sales Services & Other | FY 84 $ Sales Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| **AAFES-Pacific Totals** | **$400,832,000** | **$204,514,000** | **$605,345,000** | **$580,671,000** | **+4.25%** |

# AAFES Exchange Sales—FY 84 (Other—Overseas)

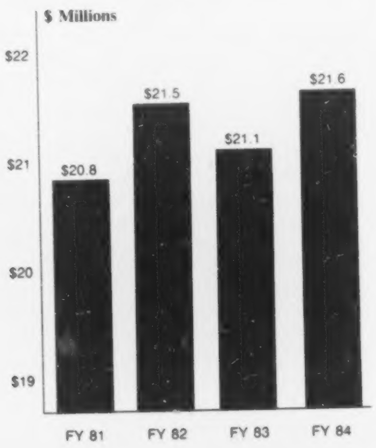
## Alaska Area (AKAX)

| Exchange Area | FY 84 $ Sales<br>Retail | Services & Other | Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Eielson AFB (Fairbanks) | –0– | –0– | –0– | 13,328,000 | 0.00% |
| Elmendorf AFB (Anchorage) | 39,927,000 | 14,328,000 | 54,255,000 | 35,883,000 | 51.20% |
| Fort Greely (Big Delta) | 2,410,000 | 953,000 | 3,363,000 | 3,298,000 | 1.97% |
| Fort Richardson (Anchorage) | –0– | –0– | –0– | 17,005,000 | 0.00% |
| Fort Wainwright (Fairbanks) | 20,580,000 | 6,051,000 | 26,631,000 | 13,638,000 | 95.27% |
| "Remote Sites" | 2,524,000 | 235,000 | 2,759,000 | 3,311,000 | –16.67% |
| **AKAX Totals** | **$65,441,000** | **$21,567,000** | **$87,008,000** | **$86,463,000** | **+0.63%** |

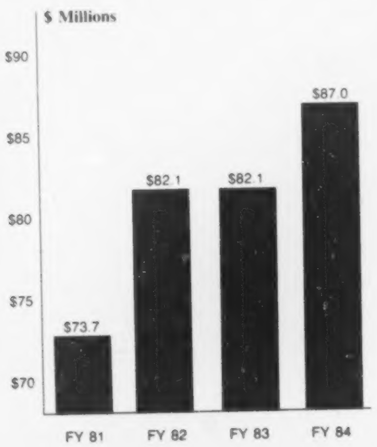
**4-Year Retail Sales Summary**
**Alaska Area Exchange (AAFES)**



**4-Year Services Sales Summary**
**Alaska Area Exchange (AAFES)**



**4-Year Total Sales Summary**
**Alaska Area Exchange (AAFES)**



## Azores

| Exchange Area | FY 84 $ Sales<br>Retail | Services & Other | Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Azores | $7,398,000 | $1,907,000 | $9,305,000 | $8,784,000 | +5.93% |

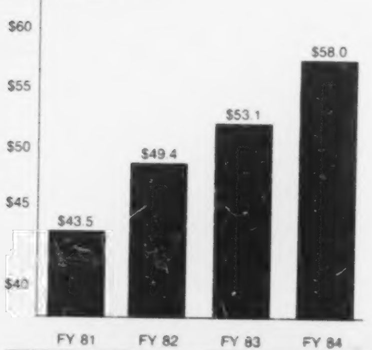
## Greenland

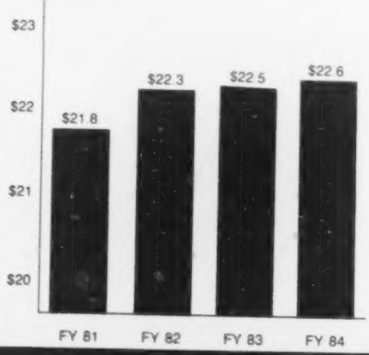
| Exchange Area | FY 84 $ Sales<br>Retail | Services & Other | Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Sondrestrom AB | $1,277,000 | $44,000 | $1,321,000 | $1,508,000 | –12.40% |
| Thule AB | $2,954,000 | $61,000 | $3,015,000 | $3,016,000 | –0.03% |

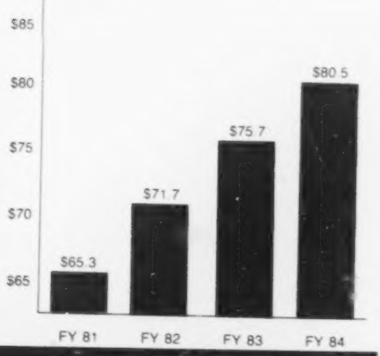
## Panama Area (PAAX)

| Exchange Area | FY 84 $ Sales<br>Retail | Services & Other | Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Panama Area (PAAX) | $57,983,000 | $22,565,000 | $80,548,000 | $75,665,000 | +6.45% |

# AAFES Exchange Sales—FY 84


4-Year Retail Sales Summary
Panama Area Exchange (AAFES)


4-Year Services Sales Summary
Panama Area Exchange (AAFES)


4-Year Total Sales Summary
Panama Area Exchange (AAFES)

## Puerto Rico

| Exchange Area | FY 84 $ Sales Retail | FY 84 $ Sales Services & Other | FY 84 $ Sales Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Puerto Rico | $34,742,000 | $2,832,000 | $37,574,000 | $32,995,000 | +13.88% |

## Totals

| | FY 84 $ Sales Retail | FY 84 $ Sales Services & Other | FY 84 $ Sales Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| **Overseas Totals** | **$1,501,259,000** | **$618,299,000** | **$2,119,560,000** | **$2,084,342,000** | **+1.69%** |
| **Worldwide Totals** | **$3,428,291,000** | **$1,331,308,000** | **$4,759,601,000** | **$4,707,430,000** | **+1.11%** |

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# Coast Guard NAFA Sales—FY 84 Continental U.S.

## Coast Guard Cutters

| | FY 84 $ Sales | | | | |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | Total $ Sales FY83 | Total Sales % Change 84 v. 83 |
| Coast Guard Cutters | $390,643 | $136,225 | $526,868 | $465,562 | 11.64% |

## NAFAs

| | FY 84 $ Sales | | | | |
|---|---|---|---|---|---|
| Store | Retail | Services & Other | Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
| Alameda, CA | 839,683 | 350,441 | 1,190,124 | 1,174,608 | 1.32% |
| Alexandria, VA | 35,699 | 81,149 | 116,848 | 103,005 | 13.44% |
| Atlantic Beach, NC | 24,523 | 20,683 | 45,206 | 44,794 | 0.92% |
| Baltimore, MD | 551,141 | 419,249 | 970,390 | 1,026,827 | −5.50% |
| Boston, MA | 1,152,840 | 312,907 | 1,465,747 | 2,061,668 | −28.90% |
| Brooklyn, NY | 1,982,882 | 879,711 | 2,862,593 | 2,513,294 | 13.90% |
| Buffalo, NY | 181,049 | 19,295 | 200,344 | 212,559 | −5.75% |
| Cape Cod, MA | 2,194,665 | 6,358,890 | 8,553,555 | 9,293,393 | −7.96% |
| Cape May, NJ | 1,016,479 | 1,932,040 | 2,948,519 | 3,349,400 | −11.97% |
| Charleston, SC | 407,624 | 615,876 | 1,023,500 | 961,417 | 6.46% |
| Clearwater, FL | 1,173,267 | 510,392 | 1,683,659 | 1,860,197 | −9.49% |
| Cleveland, OH MSO | −0− | 870,575 | 870,575 | 949,348 | −8.30% |
| Cleveland, OH 9th Dist Exchange | 481,738 | 3,178,738 | 3,660,476 | 4,038,721 | −9.37% |
| Detroit, MI | 412,542 | 113,924 | 526,466 | 478,341 | 10.06% |
| Elizabeth City, NC | 1,403,309 | 430,310 | 1,833,619 | 2,131,681 | −13.98% |
| Galena Park, TX | 58,792 | 7,701 | 66,493 | 73,309 | −9.30% |
| Galveston, TX | 326,085 | 83,757 | 409,842 | 473,362 | −13.42% |
| Gloucester City, NJ | 621,098 | −0− | 621,098 | 610,874 | 1.67% |
| Governors Island, NY | 3,520,925 | 2,380,410 | 5,901,335 | 6,654,304 | −11.32% |
| Hampton Bay, NY | 199,632 | −0− | 199,632 | 224,099 | −10.92% |
| McKinleyville, CA | 96,864 | 7,917 | 104,781 | 123,418 | −15.10% |
| Mayport, FL | 1,010,599 | −0− | 1,010,599 | 996,316 | 1.43% |
| Miami Beach, FL | 342,173 | 169,929 | 512,102 | 608,722 | −15.87% |
| Milwaukee, WI | 146,781 | 9,065 | 155,846 | 176,110 | −11.51% |
| Mobile (ATC), AL | 1,749,939 | 7,845,261 | 9,595,200 | 9,860,051 | −2.69% |
| Mobile (Base), AL | 1,301,527 | 938,305 | 2,239,832 | 2,498,932 | −10.37% |
| Muskegon, MI | 88,942 | 334,690 | 423,632 | 577,167 | −26.60% |
| New Haven, CT | 3,810,641 | 1,367,130 | 5,177,744 | 5,290,259 | −2.13% |
| New London, CT | 652,897 | −0− | 652,897 | 563,729 | 15.82% |
| New Orleans, LA | 321,436 | 34,245 | 355,701 | 403,631 | −11.87% |
| North Bend, OR | 250,526 | 155,609 | 406,135 | 406,531 | −0.10% |
| Opa Locka, FL | 2,335,063 | 2,460,831 | 4,795,894 | 5,021,475 | −4.49% |
| Petaluma, CA | 1,116,961 | 456,818 | 1,573,779 | 2,091,230 | −24.74% |
| Port Angeles, WA | 376,124 | 411,577 | 787,701 | 808,008 | −2.51% |
| Portland, OR | 53,460 | 8,520 | 61,980 | 70,499 | −12.08% |

Continued on next page

## Coast Guard NAFA Sales—FY 84 Continental U.S.

### NAFAs

Continued from previous page

| | FY 84 $ Sales | | | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| Portsmouth, VA | 854,167 | 465,738 | 1,319,905 | 1,308,624 | 0.86% |
| St. Louis, MO | 414,044 | 186,277 | 600,321 | 698,926 | −14.11% |
| St. Petersburg, FL | 3,234,637 | 3,905,257 | 7,139,894 | 7,468,767 | −4.40% |
| San Diego, CA | 73,136 | 17,197 | 90,333 | 112,761 | −19.89% |
| San Pedro, CA | 175,088 | 96,711 | 271,799 | 257,347 | 5.62% |
| Sault St. Marie, MI | 153,552 | 29,864 | 183,416 | 185,857 | −1.31% |
| Seattle, WA | 1,256,036 | 420,329 | 1,676,365 | 1,611,588 | 4.02% |
| South Portland, ME | 2,064,890 | 656,808 | 2,721,698 | 2,567,146 | 6.02% |
| Traverse City, MI | 239,656 | 661,912 | 901,568 | 1,003,090 | −10.12% |
| Warrenton, OR | 486,206 | 660,742 | 1,146,948 | 1,195,921 | −4.10% |
| Yorktown, VA | 1,362,265 | 562,244 | 1,924,509 | 1,788,587 | 7.60% |

### Totals

| | FY 84 $ Sales | | | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| **CONUS Totals** | **$40,069,865** | **$40,941,638** | **$81,011,503** | **$85,971,744** | **−6.12%** |

## Coast Guard NAFA Sales—FY 84 Overseas

### Alaska

| | FY 84 $ Sales | | | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Store | Retail | Services & Other | Total | | |
| Juneau, AK | 800,711 | 190,858 | 991,569 | 1,071,730 | −8.08% |
| Ketchikan, AK | 470,680 | 99,579 | 570,259 | 589,609 | −3.39% |
| Kodiak (Support Center), AK | 3,441,381 | 1,590,852 | 5,032,233 | 4,770,451 | 5.20% |
| Sitka, AK | 283,705 | 74,272 | 357,977 | 386,787 | −8.05% |
| **Alaska Totals** | **$4,996,477** | **$1,955,561** | **$6,952,038** | **$6,818,577** | **+1.92%** |

### Hawaii

| | FY 84 $ Sales | | | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Store | Retail | Services & Other | Total | | |
| Barbers Point, HI | −0− | 77,600 | 77,600 | 67,706 | 12.75% |
| Honolulu, HI | 1,594,210 | 2,408,711 | 4,002,921 | 3,972,120 | 0.77% |
| **Hawaii Totals** | **$1,594,210** | **$2,486,311** | **$4,080,521** | **$4,039,826** | **1.00%** |

# Coast Guard NAFA Sales—FY 84

## Italy

| Store | FY 84 $ Sales |  |  | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
|  | Retail | Services & Other | Total |  |  |
| Lampedusa | 20,780 | 9,909 | 30,689 | 14,251 | 53.56% |
| Sellia Marina | 15,938 | −0− | 15,938 | −0− | 100.00% |
| **Italy Totals** | **$36,718** | **$9,909** | **$62,965** | **$14,251** | **77.22%** |

## Puerto Rico

| Store | FY 84 $ Sales |  |  | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
|  | Retail | Services & Other | Total |  |  |
| Aquadilla | 2,089,935 | 3,723,069 | 5,813,004 | 5,245,954 | 9.75% |
| San Juan | 1,382,438 | 1,383,669 | 2,766,512 | 2,748,817 | 0.64% |
| **Puerto Rico Totals** | **$3,472,778** | **$5,106,738** | **$8,579,516** | **$7,994,771** | **6.82%** |

## Spain

| Store | FY 84 $ Sales |  |  | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
|  | Retail | Services & Other | Total |  |  |
| Estaritt | 12,233 | 55 | 12,288 | 27,303 | −122.19% |

## Turkey

| Store | FY 84 $ Sales |  |  | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
|  | Retail | Services & Other | Total |  |  |
| Kargabarun | 7,232 | −0− | 7,232 | 6,652 | 8.02% |

## United Kingdom

| Store | FY 84 $ Sales |  |  | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
|  | Retail | Services & Other | Total |  |  |
| Sylt | 12,806 | 1,438 | 14,189 | 19,653 | −38.51% |

## Totals

|  | FY 84 $ Sales |  |  | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
|  | Retail | Services & Other | Total |  |  |
| **Overseas Totals** | **$10,132,454** | **$9,551,608** | **$19,684,062** | **$18,921,033** | **3.88%** |
| **Worldwide Totals** | **$50,592,962** | **$50,629,471** | **$101,222,433** | **$105,358,339** | **−4.00%** |

# Navy Exchange Sales—FY84

## Summary of Sales by Retail Department

| Department/Dept. Code | Continental U.S. | | Overseas | | Worldwide | |
|---|---|---|---|---|---|---|
| | $ Sales | % | $ Sales | % | $ Sales | % |
| Auto Accessories/C8 | 22,476,714 | 2.9 | 7,213,727 | 2.1 | 29,690,442 | 2.7 |
| Beverages (Beer & Soda)/A6 | 44,372,686 | 5.8 | 21,534,111 | 6.2 | 65,906,797 | 5.9 |
| Books & Periodicals/C7 | 12,037,505 | 1.6 | 5,631,313 | 1.6 | 17,668,818 | 1.6 |
| Boys' Wear/G2 | 8,503,513 | 1.1 | 2,171,078 | 0.6 | 10,674,591 | 1.0 |
| Cameras & Equipment/B1 | 9,991,047 | 1.3 | 8,753,524 | 2.5 | 18,744,571 | 1.7 |
| Candy & Confections/A1 | 12,006,751 | 1.6 | 4,942,133 | 1.4 | 16,948,885 | 1.5 |
| Consumer Electronics & Musical Instruments/B5 | 45,480,720 | 5.9 | 64,935,321 | 18.8 | 110,416,041 | 9.9 |
| Domestics/E4 | 15,699,775 | 2.1 | 6,077,125 | 1.8 | 21,776,901 | 2.0 |
| Electrical Appliances/B4 | 20,065,099 | 2.6 | 16,451,193 | 4.8 | 36,516,292 | 3.3 |
| Fabrics & Sewing Accessories/F2 | –0– | 0.0 | 2,064,356 | 0.6 | 2,064,357 | 0.2 |
| Family Shoes/E7 | 27,048,487 | 3.5 | 6,384,668 | 1.8 | 33,433,155 | 3.0 |
| Film & Accessories/A7 | 8,229,897 | 1.1 | 3,117,230 | 0.9 | 11,347,127 | 1.0 |
| Food (Convenience Products)/A4 | 38,804,638 | 5.1 | 17,025,046 | 4.9 | 55,829,685 | 5.0 |
| Fragrances & Cosmetics/D5 | 15,380,069 | 2.0 | 4,795,153 | 1.4 | 20,175,222 | 1.8 |
| Furniture/B9 | 2,960,180 | 0.4 | 15,883,334 | 4.6 | 18,843,514 | 1.7 |
| Garden Supplies & Outdoor Living/C9 | 23,782,327 | 3.1 | 3,916,279 | 1.1 | 27,698,606 | 2.5 |
| Girls' Wear/G1 | 7,859,935 | 1.0 | 2,310,358 | 0.7 | 10,170,294 | 0.9 |
| Hardware & Pet Supplies/C4 | 17,983,764 | 2.3 | 4,070,344 | 1.2 | 22,054,109 | 2.0 |
| Home Furnishings & Giftware/B8 | 16,321,502 | 2.1 | 13,910,287 | 4.0 | 30,231,790 | 2.7 |
| Household Supplies/D3 | 13,027,624 | 1.7 | 5,722,079 | 1.7 | 18,749,703 | 1.7 |
| Housewares/B2 | 12,045,792 | 1.6 | 4,797,480 | 1.4 | 16,843,272 | 1.5 |
| Infants' & Children's Wear/E5 | 10,536,996 | 1.4 | 3,790,462 | 1.1 | 14,327,459 | 1.3 |
| Intimate Apparel & Accessories/E3 | 17,361,233 | 2.3 | 4,021,399 | 1.2 | 21,382,633 | 1.9 |
| Jewelry/D2 | 17,706,792 | 2.3 | 11,003,345 | 3.2 | 28,710,137 | 2.6 |
| Luggage & Leather Goods/C1 | 8,701,766 | 1.1 | 2,362,617 | 0.7 | 11,064,383 | 1.0 |
| Men's Wear & Accessories/E2 | 60,096,123 | 7.8 | 15,427,291 | 4.5 | 75,523,414 | 6.8 |
| Party Goods & Greeting Cards/C3 | 11,239,642 | 1.5 | 3,717,757 | 1.1 | 14,957,399 | 1.3 |
| Records & Tapes/A8 | 16,824,022 | 2.2 | 14,594,345 | 4.2 | 31,418,368 | 2.8 |
| Sporting Goods/B3 | 12,472,946 | 1.6 | 7,684,760 | 2.2 | 20,157,707 | 1.8 |
| Stationery/C2 | 12,837,720 | 1.7 | 3,448,021 | 1.0 | 16,285,742 | 1.5 |
| Tobacco & Smoking Accessories/A2 | 98,872,762 | 12.9 | 13,438,353 | 3.9 | 112,311,115 | 10.1 |
| Toiletries & Drugs/D1 | 35,048,718 | 4.6 | 10,557,877 | 3.1 | 45,606,595 | 4.1 |
| Toys & Wheel Goods/C5 | 17,161,926 | 2.2 | 8,504,495 | 2.5 | 25,666,422 | 2.3 |
| Watches & Accessories/D4 | 8,848,793 | 1.2 | 3,754,601 | 1.1 | 12,603,395 | 1.1 |
| Women's Ready-to-Wear/E8 | 25,243,472 | 3.3 | 7,297,176 | 2.1 | 32,540,649 | 2.9 |
| Miscellaneous/E9 | 3,299,348 | 0.4 | 7,019,181 | 2.0 | 10,318,529 | 0.9 |
| Department Sales Adjustments* | | | | | | |
| All "B" Departments/B6 | (22) | a | 1,588,110 | 0.5 | 1,588,090 | 0.1 |
| All "C" Departments/C6 | 783,366 | 0.1 | 134,485 | a | 917,852 | 0.1 |
| All "D" Departments/D6 | –0– | a | 54,625 | a | 54,625 | a |
| All "E" Departments/E6 | 1 | a | 77,664 | a | 77,666 | a |
| **Retail Subtotals** | **$731,113,631** | **95.5%** | **$340,182,703** | **98.4%** | **$1,071,296,352** | **96.4%** |
| Uniforms & Accessories | 34,477,674 | 4.5 | 5,625,182 | 1.6 | 40,102,856 | 3.6 |
| **Retail Department Totals** | **$765,591,326** | **100.0%** | **$345,807,885** | **100.0%** | **$1,111,399,208** | **100.0%** |

Note: Navy exchange sales for FY84 are preliminary and unaudited.

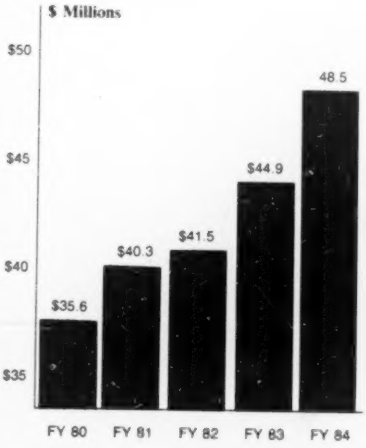
a Less than one-tenth of one percent.

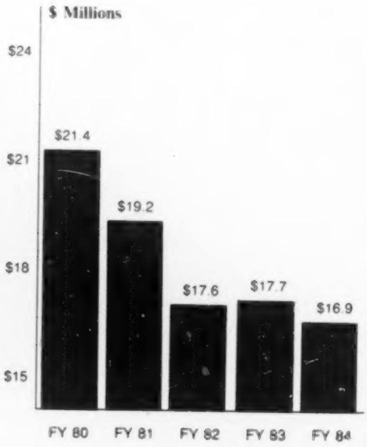
* Sales adjustments compensate for inventory and are prorated among appropriate retail category departments prior to NAVRESSO's release of final sales data.

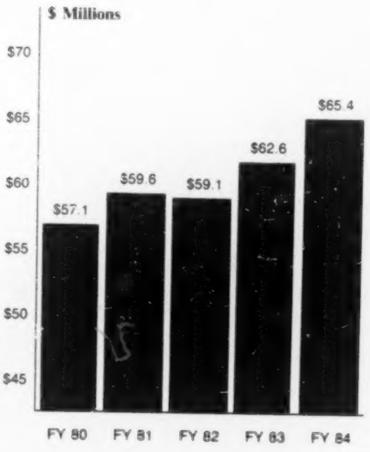
# NAVRESSO Exchange Sales—FY 84 Continental U.S.

## Auburn FSO

| Store | FY 84 $ Sales Retail | FY 84 $ Sales Services & Other | FY 84 $ Sales Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Bangor (NSB), WA | 8,649,363 | 4,802,871 | 13,452,234 | 11,228,683 | 19.80% |
| Bremerton (PSNS), WA | 10,043,278 | 3,246,863 | 13,290,141 | 13,149,819 | 1.07% |
| Coos Head (NF), OR | 77,510 | 3,028 | 80,539 | 68,149 | 18.18% |
| Pacific Beach (NF), WA | 100,401 | 18,793 | 119,194 | 139,793 | −14.74% |
| Seattle (NS), WA | 15,217,559 | 2,539,029 | 17,756,589 | 17,794,295 | −0.21% |
| Whidbey Island (NAS), WA | 14,436,615 | 6,282,935 | 20,722,550 | 20,262,834 | 2.27% |
| **Auburn FSO Totals** | **$48,524,726** | **$16,893,519** | **$65,421,247** | **$62,643,573** | **+4.43%** |


**5-Year Retail Sales Summary Auburn FSO (NAVRESSO)**


**5-Year Services Sales Summary Auburn FSO (NAVRESSO)**

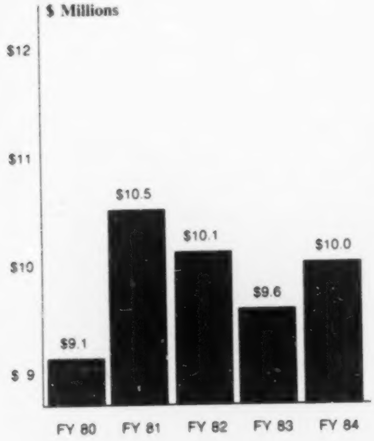

**5-Year Total Sales Summary Auburn FSO (NAVRESSO)**

## Corpus Christi Region

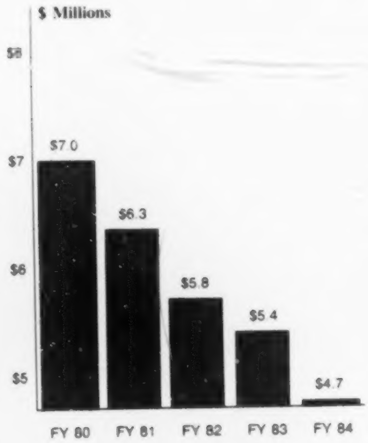
| Store | FY 84 $ Sales Retail | FY 84 $ Sales Services & Other | FY 84 $ Sales Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Beeville (NAS), TX[b] | 1,523,509 | 1,243,873 | 2,767,382 | 2,762,896 | 0.16% |
| Corpus Christi (NAS), TX[m] | 6,704,709 | 2,289,214 | 8,993,923 | 9,426,459 | −4.59% |
| Kingsville (NAS), TX[b] | 1,741,537 | 1,228,340 | 2,969,877 | 2,839,601 | 4.59% |
| **Region Totals** | **$9,969,755** | **$4,761,427** | **$14,731,182** | **$15,028,956** | **−1.98%** |

*Notes:* [b]Branch Exchanges; [m]Main Exchange.

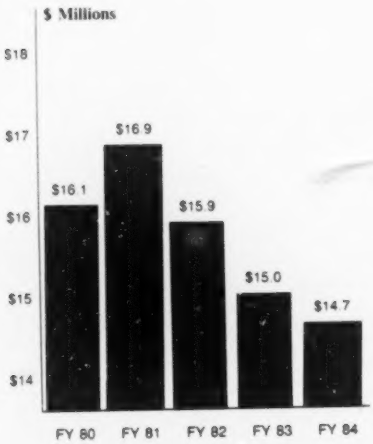
**5-Year Retail Sales Summary**
**Corpus Christs Region (NAVRESSO)**



**5-Year Services Sales Summary**
**Corpus Christi Region (NAVRESSO)**



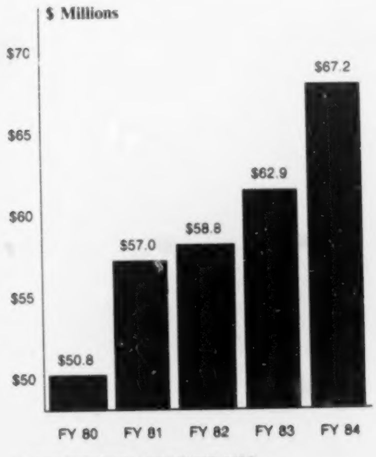
**5-Year Total Sales Summary**
**Corpus Christs Region (NAVRESSO)**



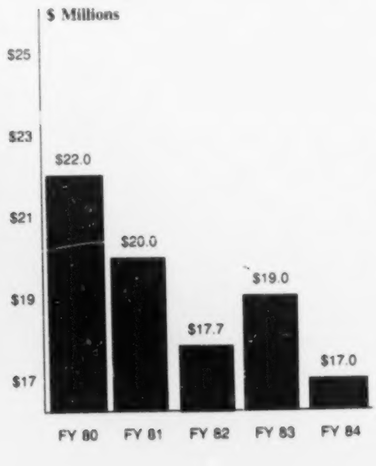
## Davisville FSO

| Store | FY 84 $ Sales Retail | Services & Other | Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Brooklyn (NS), NY | 1,514,711 | 181,277 | 1,695,988 | 1,811,501 | −6.38% |
| Brunswick (NAS), ME | 7,315,691 | 2,169,990 | 9,485,682 | 9,493,761 | −0.09% |
| Cutler (NCU), ME | 319,740 | 72,438 | 392,178 | 371,478 | 5.57% |
| Mitchel Field (NHA), NY | 8,424,632 | 1,029,578 | 9,454,211 | 9,138,877 | 3.45% |
| New London (NSB), CT | 27,338,246 | 8,650,467 | 35,988,713 | 33,660,906 | 6.92% |
| Newport (NETC), RI | 14,919,838 | 3,774,841 | 18,694,679 | 18,771,100 | −0.41% |
| Portsmouth (PNS), NH | 411,764 | 328,582 | 740,347 | 817,196 | −9.40% |
| Scotia (NAU), NY | 1,802,158 | 119,889 | 1,922,047 | 1,844,361 | 4.21% |
| South Weymouth (NAS), MA | 4,794,174 | 489,505 | 5,283,679 | 5,339,880 | −1.05% |
| Winter Harbor (NSGA), ME | 416,777 | 223,504 | 640,281 | 577,268 | 10.92% |
| **Davisville FSO Totals** | **$67,257,731** | **$17,040,071** | **84,297,805** | **$81,826,328** | **+3.02%** |

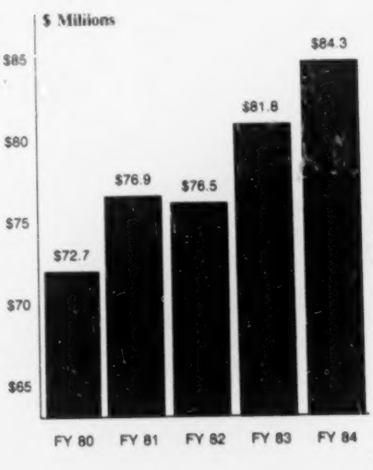
**5-Year Retail Sales Summary**
**Davisville FSO (NAVRESSO)**



**5-Year Services Sales Summary**
**Davisville FSO (NAVRESSO)**



**5-Year Total Sales Summary**
**Davisville FSO (NAVRESSO)**

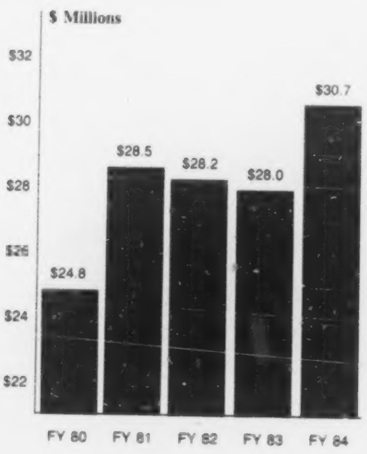


# NAVRESSO Exchange Sales—FY 84

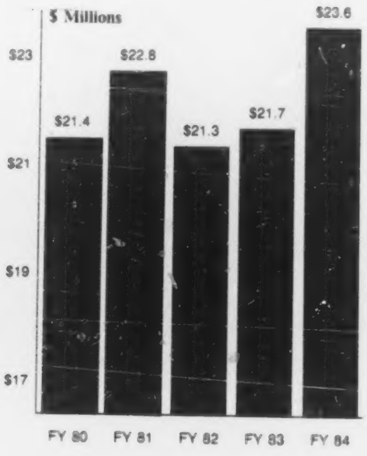
## Great Lakes Region

| Store | FY 84 $ Sales Retail | FY 84 $ Sales Services & Other | FY 84 $ Sales Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Crane (NWSC), IN | 259,185 | 76,693 | 335,879 | 333,140 | 0.82% |
| Glenview (NAS), IL | 1,463,365 | 798,798 | 2,262,164 | 2,292,064 | −1.30% |
| Great Lakes (NRMC), IL | 915,685 | 1,301,133 | 2,216,818 | 1,840,382 | 20.45% |
| Great Lakes (NTC), IL | 28,103,425 | 21,422,595 | 49,526,020 | 45,245,245 | 9.46% |
| **Region Totals** | **$30,741,660** | **$23,599,219** | **$54,340,881** | **$49,710,831** | **+9.31%** |

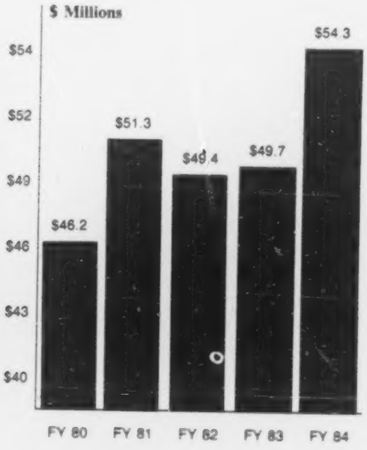
**5-Year Retail Sales Summary**
**Great Lakes Region (NAVRESSO)**



**5-Year Services Sales Summary**
**Great Lakes Region (NAVRESSO)**



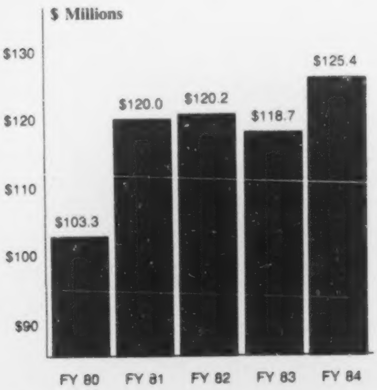
**5-Year Total Sales Summary**
**Great Lakes Region (NAVRESSO)**



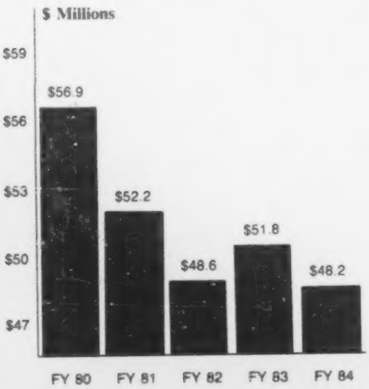
## Jacksonville FSO

| Store | FY 84 $ Sales Retail | FY 84 $ Sales Services & Other | FY 84 $ Sales Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Athens (NSCS), GA | 1,577,855 | 415,154 | 1,993,010 | 1,965,626 | 1.39% |
| Atlanta (NAS), GA | 2,000,347 | 722,843 | 2,723,191 | 2,869,935 | −5.11% |
| Beaufort (NH), SC | 620,206 | 417,073 | 1,037,280 | 735,655 | 41.00% |
| Cecil Field (NAS), FL | 5,750,357 | 4,296,425 | 10,046,782 | 10,316,201 | −2.61% |
| Charleston (NRMC), SC | 328,640 | 439,475 | 768,115 | 718,089 | 6.97% |
| Charleston (NS), SC | 15,172,642 | 6,966,239 | 22,138,881 | 20,736,466 | 6.76% |
| Charleston (NWS), SC | 5,468,469 | 2,076,507 | 7,544,977 | 6,859,021 | 10.00% |
| Jacksonville (NAS), FL | 29,251,355 | 10,638,670 | 39,890,025 | 40,087,257 | −0.49% |
| Key West (NAS), FL | 4,248,363 | 2,051,554 | 6,299,917 | 6,723,270 | −6.30% |
| Kings Bay (NSB), GA | 2,171,551 | 1,481,162 | 3,652,714 | 3,239,556 | 12.75% |
| Mayport (NS), FL | 9,572,610 | 4,822,760 | 14,395,371 | 14,511,390 | −0.80% |
| Orlando (NTC), FL | 49,215,226 | 13,844,427 | 63,059,653 | 61,743,207 | 2.13% |
| **Jacksonville FSO Totals** | **$125,377,621** | **$48,172,289** | **$173,549,916** | **$170,505,673** | **+1.79%** |

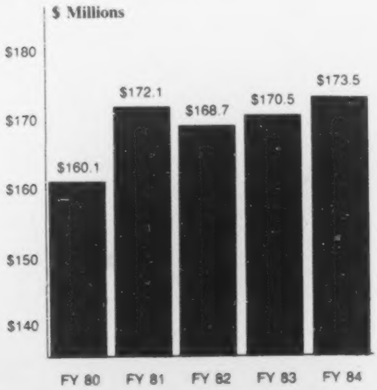
**5-Year Retail Sales Summary**
**Jacksonville FSO (NAVRESSO)**



**5-Year Services Sales Summary**
**Jacksonville FSO (NAVRESSO)**



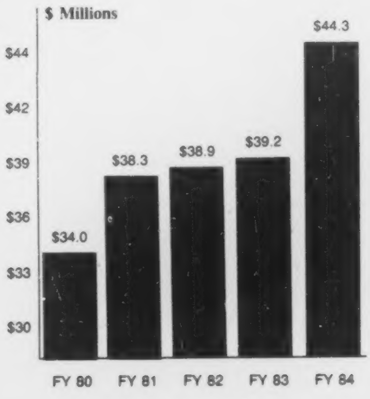
**5-Year Total Sales Summary**
**Jacksonville FSO (NAVRESSO)**



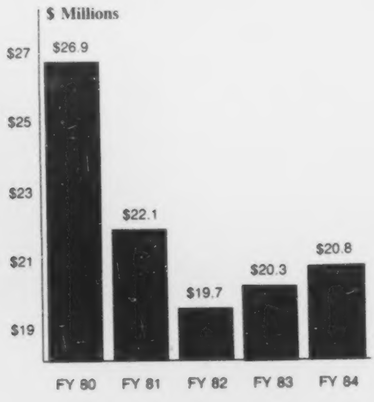
## Mechanicsburg FSO

| Store | FY 84 $ Sales Retail | FY 84 $ Sales Services & Other | FY 84 $ Sales Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Annapolis (NS), MD | 4,348,400 | 1,286,090 | 5,634,490 | 4,996,370 | 12.77% |
| Arlington (NUC), VA | 1,032,477 | 126,739 | 1,159,217 | –0– | 0.00% |
| Bethesda (NMC), MD | 8,293,374 | 4,627,227 | 12,920,602 | 11,900,924 | 8.57% |
| Colts Neck (NWS), NJ | 637,292 | 341,247 | 978,540 | 771,381 | 26.86% |
| Dahlgren (NSWS), VA | 407,101 | 741,189 | 1,148,290 | 1,005,002 | 14.26% |
| Indian Head (NOS), MD | 333,046 | 247,652 | 580,699 | 603,916 | –3.84% |
| Lakehurst (NAEC), NJ | 2,752,797 | 799,924 | 3,552,721 | 3,673,349 | –3.28% |
| Mechanicsburg (NSPCC), PA | 684,998 | 27,467 | 712,466 | 616,182 | 15.63% |
| Patuxent River (NAS), MD | 6,879,880 | 3,743,278 | 10,623,158 | 10,054,301 | 5.66% |
| Philadelphia (ASO), PA | 381,533 | 15,523 | 397,056 | 367,803 | 7.95% |
| Philadelphia (NRMC), PA | 412,884 | 136,151 | 549,036 | 584,446 | –6.06% |
| Philadelphia (NS), PA | 11,801,900 | 4,500,381 | 16,302,282 | 15,005,300 | 8.64% |
| Warminster (NADC), PA | 460,614 | 99,567 | 560,182 | 550,013 | 1.85% |
| Washington Navy Yard (ND), DC | 1,329,513 | 2,997,945 | 4,327,459 | 4,080,365 | 6.06% |
| Willow Grove (NAS), PA | 4,566,493 | 1,076,976 | 5,643,470 | 5,294,960 | 6.58% |
| **Mechanicsburg FSO Totals** | **$44,322,302** | **$20,767,356** | **$65,089,668** | **$59,504,312** | **+9.39%** |

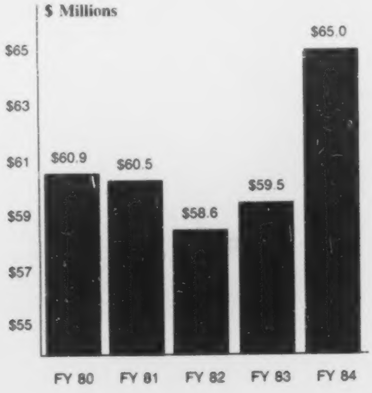
**5-Year Retail Sales Summary**
**Mechanicsburg FSO (NAVRESSO)**



**5-Year Services Sales Summary**
**Mechanicsburg FSO (NAVRESSO)**



**5-Year Total Sales Summary**
**Mechanicsburg FSO (NAVRESSO)**

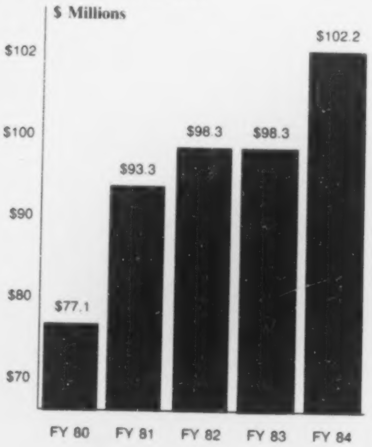


# NAVRESSO Exchange Sales—FY 84

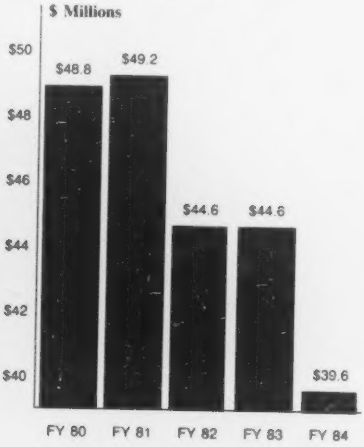
## Norfolk FSO

| Store | FY 84 $ Sales<br>Retail | <br>Services & Other | <br>Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Chesapeake (NSGA), VA | 389,483 | 245,215 | 634,698 | 681,574 | −6.88% |
| Dam Neck (FCTC), VA | 2,004,966 | 2,726,391 | 4,731,358 | 4,745,818 | −0.30% |
| Little Creek (NAB), VA | 34,443,440 | 7,770,670 | 42,214,110 | 42,883,203 | −1.56% |
| Norfolk (AFHSA), VA | 1,096,249 | 1,254,923 | 2,351,172 | 2,472,995 | −4.93% |
| Norfolk (NB), VA | 36,924,314 | 16,392,383 | 53,316,698 | 54,799,521 | −2.71% |
| Norfolk (NUMOC), VA | 1,720,771 | −0− | 1,720,771 | 494,107 | 248.26% |
| Oceana (NAS), VA | 14,735,539 | 6,091,540 | 20,827,079 | 20,755,923 | 0.34% |
| Portsmouth (NNS), VA | 7,804,351 | 2,108,310 | 9,912,662 | 9,908,598 | 0.04% |
| Portsmouth (NRMC), VA | 1,498,536 | 1,914,135 | 3,412,671 | 3,523,190 | −3.14% |
| Sugar Grove (NRS), WV | 147,443 | 51,228 | 198,672 | 169,341 | 17.32% |
| Yorktown (NWS), VA | 1,406,930 | 1,068,646 | 2,475,576 | 2,404,654 | 2.95% |
| **Norfolk FSO Totals** | **$102,172,022** | **$39,623,441** | **$141,795,467** | **$142,838,924** | **−0.73%** |

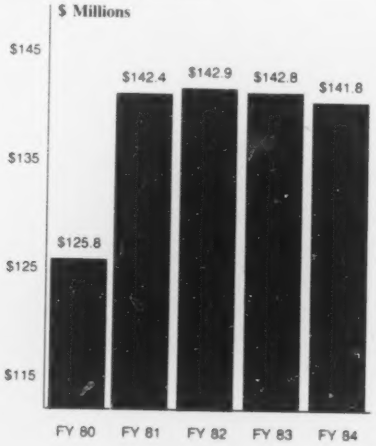
**5-Year Retail Sales Summary**
**Norfolk FSO (NAVRESSO)**



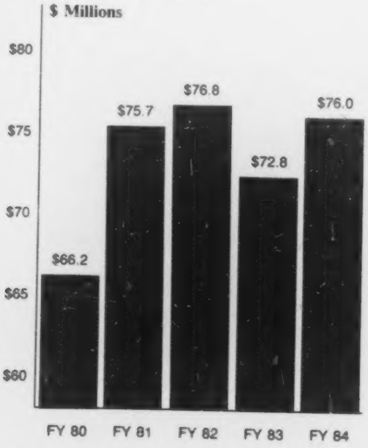
**5-Year Services Sales Summary**
**Norfolk FSO (NAVRESSO)**



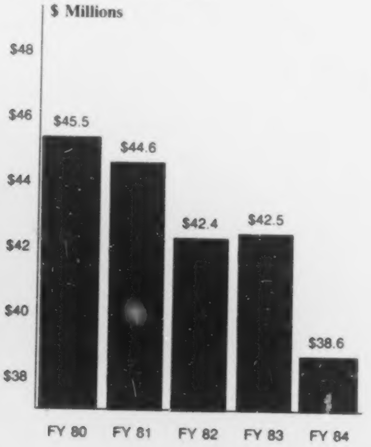
**5-Year Total Sales Summary**
**Norfolk FSO (NAVRESSO)**



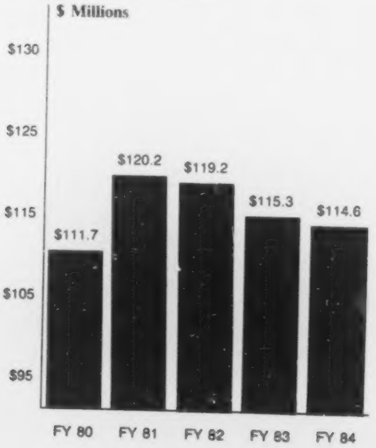
**5-Year Retail Sales Summary**
**Oakland FSO (NAVRESSO)**



**5-Year Services Sales Summary**
**Oakland FSO (NAVRESSO)**



**5-Year Total Sales Summary**
**Oakland FSO (NAVRESSO)**



# NAVRESSO Exchange Sales—FY 84

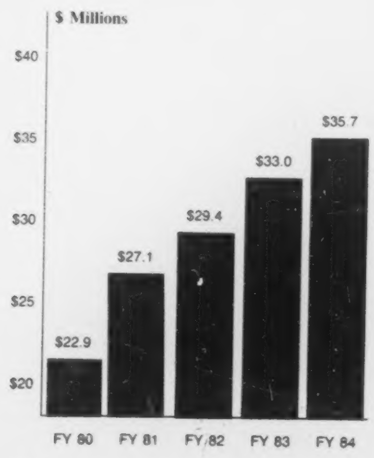
## Oakland FSO

| Store | FY 84 $ Sales | | | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| Alameda (NAS), CA | 16,771,149 | 6,840,625 | 23,611,775 | 23,895,774 | −1.19% |
| Concord (NWS), CA | 812,367 | 523,049 | 1,335,416 | 1,395,761 | −4.32% |
| Fallon (NAS), NV | 1,664,319 | 1,112,714 | 2,777,033 | 2,507,130 | 10.77% |
| Ferndale (NF), CA | 155,006 | 98,387 | 253,394 | 286,749 | −11.63% |
| Lemoore (NAS), CA | 8,587,870 | 6,543,473 | 15,131,344 | 14,242,155 | 6.24% |
| Mare Island (NS), CA | 7,325,292 | 5,323,693 | 12,648,986 | 12,625,416 | 0.19% |
| Moffett Field (NAS), CA | 20,031,245 | 7,802,640 | 27,833,885 | 28,824,350 | −3.44% |
| Monterey (NPGS), CA | 6,964,903 | 3,263,320 | 10,228,224 | 10,029,882 | 1.98% |
| Novato (DoDHF), CA | 5,414,770 | 2,100,068 | 7,514,838 | 7,551,932 | −0.49% |
| Oakland (NRMC), CA | 2,402,863 | 1,562,388 | 3,965,252 | 4,485,782 | −11.60% |
| Oakland (NSC), CA | 397,973 | 447,058 | 845,031 | 805,458 | 4.91% |
| Skaggs Island (NSGA), CA | 128,508 | 146,969 | 275,478 | 264,490 | 4.15% |
| Stockton (NCS), CA | 1,339,257 | 454,155 | 1,793,413 | 1,840,002 | −2.53% |
| Treasure Island (NSA), CA | 3,995,824 | 2,415,045 | 6,410,869 | 6,515,226 | −1.60% |
| **Oakland FSO Totals** | **$75,991,346** | **$38,633,584** | **$114,624,938** | **$115,270,107** | **−0.56%** |

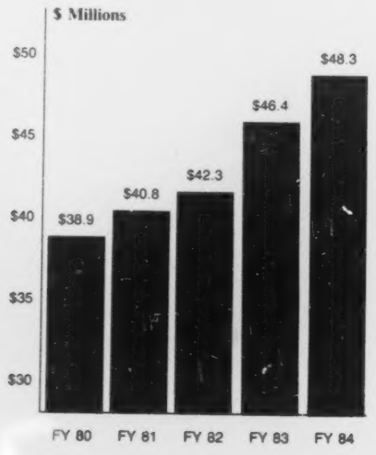
## Pensacola Region

| Store | FY 84 $ Sales | | | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| Gulfport (NCBC), MS | 4,506,518 | 2,180,506 | 6,687,024 | 6,214,332 | 7.07% |
| Panama City (NCSC), FL | 1,210,394 | 425,241 | 1,635,636 | 1,618,266 | 1.06% |
| Pascagoula (SSCR), MS | 479,161 | 49,820 | 528,981 | 559,268 | −5.73% |
| Pensacola (NAS), FL | 25,484,926 | 6,722,131 | 32,207,057 | 30,557,091 | 5.12% |
| Pensacola (NTTC), FL | 1,728,283 | 1,557,858 | 3,286,141 | 3,225,545 | 1.84% |
| Whiting Field (NAS),FL | 2,337,471 | 1,649,825 | 3,987,296 | 4,188,656 | −5.05% |
| **Region Totals** | **$35,746,753** | **$12,585,381** | **$48,332,135** | **$46,363,158** | **+4.25%** |

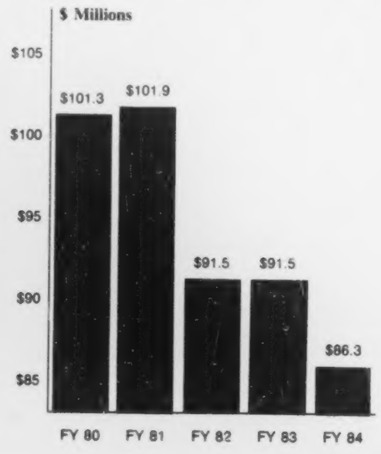
**5-Year Retail Sales Summary**
**Pensacola Region (NAVRESSO)**



**5-Year Total Sales Summary**
**Pensacola Region (NAVRESSO)**



**5-Year Services Sales Summary**
**San Diego FSO (NAVRESSO)**

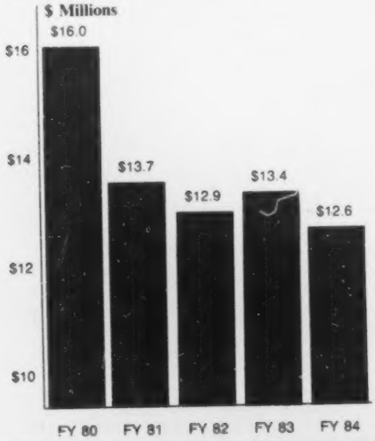


# NAVRESSO Exchange Sales—FY 84

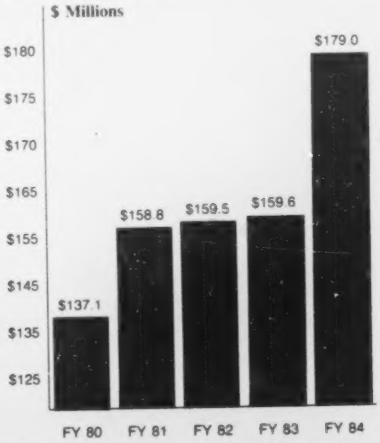
## San Diego FSO

| | FY 84 $ Sales | | | | |
|---|---|---|---|---|---|
| Store | Retail | Services & Other | Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
| China Lake (NWC), CA | 2,487,790 | 1,999,076 | 4,486,867 | 4,161,389 | 7.82% |
| Coronado (NAB),CA | 3,609,550 | 3,211,677 | 6,821,228 | 6,354,198 | 7.35% |
| El Centro (NAF), C[illegible] | 736,716 | 475,680 | 1,212,396 | 1,224,416 | −0.98% |
| Imperial Beach (NLF), CA | 6,145,126 | 2,020,662 | 8,165,788 | 7,910,425 | 3.23% |
| Long Beach (NS),CA | 22,393,113 | 9,112,958 | 31,506,072 | 31,019,259 | 1.57% |
| Miramar (NAS), CA | 35,093,737 | 12,717,554 | 47,811,291 | 43,701,247 | 9.40% |
| North Island (NAS), CA | 15,717,255 | 11,539,974 | 27,257,230 | 26,658,977 | 2.24% |
| Point Mugu (NAS), CA | 3,840,910 | 3,115,884 | 6,956,794 | 7,497,863 | −7.22% |
| Port Hueneme (NCBC), CA | 14,162,721 | 6,025,253 | 20,187,974 | 19,252,435 | 4.86% |
| San Clemente Island (NALF),CA | 159,473 | 35,705 | 195,179 | 195,766 | −0.30% |
| San Diego (NH),CA | 3,637,786 | 2,478,454 | 6,116,241 | 6,752,278 | −9.42% |
| San Diego (NS), CA | 51,429,078 | 16,188,260 | 67,617,338 | 62,179,853 | 8.74% |
| San Diego (NSSF), CA | 1,337,537 | 1,648,937 | 3,986,474 | 2,560,199 | 55.71% |
| San Diego (NTC), CA | 18,271,383 | 15,725,793 | 33,997,176 | 31,567,387 | 7.70% |
| **San Diego FSO Totals** | **$179,022,175** | **$86,295,867** | **$266,318,048** | **$251,035,692** | **+5.74%** |

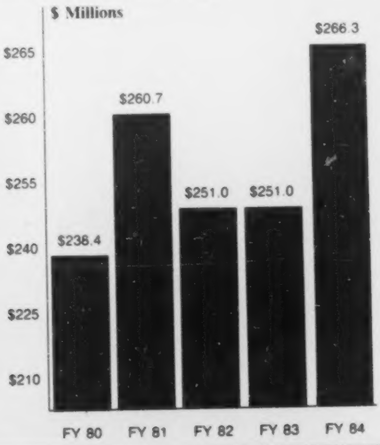
**5-Year Services Sales Summary**
**Pensacola Region (NAVRESSO)**



**5-Year Retail Sales Summary**
**San Diego FSO (NAVRESSO)**



**5-Year Total Sales Summary**
**San Diego FSO (NAVRESSO)**



## Stand Alone Exchanges

| | FY 84 $ Sales | | | | |
|---|---|---|---|---|---|
| Store | Retail | Services & Other | Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
| Dallas (NAS), TX | 8,496,485 | 1,818,211 | 10,314,696 | 9,616,640 | 7.26% |
| Meridian (NAS), MS | 4,962,197 | 2,726,821 | 7,689,019 | 7,074,162 | 8.69% |
| Millington (Memphis NAS), TN | 21,836,803 | 10,938,813 | 32,775,616 | 30,085,605 | 8.94% |
| New Orleans (NSA), LA | 8,496,314 | 2,633,001 | 11,129,315 | 10,368,391 | 7.34% |
| Staten Island (NUS), NY | 177,938 | −0− | 177,938 | 340,180 | −47.69% |

## Totals

| | FY 84 $ Sales | | | | |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
| **CONUS Totals** | **$763,095,828** | **$326,489,000** | **$1,090,587,871** | **$1,052,212,532** | **+3.65%** |

# NAVRESSO Exchange Sales—FY 84
# Overseas

## Alaska

| Store | FY 84 $ Sales Retail | FY 84 $ Sales Services & Other | FY 84 $ Sales Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Adak (NS)[m] | 8,196,563 | 2,858,587 | 11,055,151 | 10,015,536 | 10.38% |

## Australia

| Store | FY 84 $ Sales Retail | FY 84 $ Sales Services & Other | FY 84 $ Sales Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Exmouth (NCS)[m] | 1,311,029 | 286,573 | 1,597,603 | 1,439,901 | 10.95% |

## Bermuda

| Store | FY 84 $ Sales Retail | FY 84 $ Sales Services & Other | FY 84 $ Sales Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Bermuda (NAS)[m] | 6,648,273 | 1,828,192 | 8,476,466 | 7,940,444 | 6.75% |

## Crete[b]

| Store | FY 84 $ Sales Retail | FY 84 $ Sales Services & Other | FY 84 $ Sales Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Souda Bay (NAS), Crete[b] | 470,716 | 95,401 | 566,117 | 525,510 | 7.73% |

## Cuba

| Store | FY 84 $ Sales Retail | FY 84 $ Sales Services & Other | FY 84 $ Sales Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Guantanamo Bay (NS)[m] | 11,319,436 | 4,994,733 | 16,314,170 | 16,572,547 | −1.56% |

*Notes:* [m]Main Exchange, [b]Branch Exchange

## Hawaii

| Store | FY 84 $ Sales Retail | FY 84 $ Sales Services & Other | FY 84 $ Sales Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Barbers Point (NAS)[m] | 15,416,243 | 7,286,786 | 22,703,030 | 23,362,135 | −2.82% |
| Honolulu (NCA)[b] | 870,300 | 560,718 | 1,431,019 | 1,374,501 | 4.11% |
| Kekaha (PMRF)[b] | 1,600,181 | 241,327 | 1,841,509 | 1,693,363 | 8.75% |
| Lualualei (NM)[b] | 538,379 | 297,382 | 835,761 | 847,901 | −1.43% |
| Pearl Harbor (NB)[m] | 70,454,209 | 17,550,466 | 88,004,676 | 85,594,193 | 2.82% |
| **Hawaii Totals** | **$88,879,312** | **$25,936,679** | **$114,815,995** | **$112,872,093** | **+1.72%** |

*Notes:* [m]Main Exchange, [b]Branch Exchange

# NAVRESSO Exchange Sales—FY 84

## Iceland

| Store | FY 84 $ Sales | | | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| Keflavik (NS)[m] | 11,201,675 | 3,712,258 | 14,913,934 | 14,677,413 | 1.61% |

*Notes:* [m]Main Exchange; [b]Branch Exchange

## Italy

| Store | FY 84 $ Sales | | | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| Gaeta (NSAD)[b] | 954,304 | 586,499 | 1,540,804 | 1,524,096 | 1.10% |
| Naples (NAS)[m] | 22,046,924 | 9,059,732 | 31,106,657 | 32,905,202 | −5.47% |
| Sardinia (NSO)/La Maddalena[b] | 1,615,650 | 286,565 | 1,902,215 | 1,972,296 | −3.55% |
| Sigonella (NAF)/Sicily[b] | 11,595,680 | 4,258,252 | 15,853,933 | 14,095,400 | 12.48% |
| **Italy Totals** | **$36,212,558** | **$14,191,048** | **$50,403,609** | **$50,496,994** | **−0.18%** |

*Notes:* [m]Main Exchange; [b]Branch Exchange

## Japan

| Store | FY 84 $ Sales | | | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| Atsugi (NAF)[m] | 8,870,526 | 3,389,400 | 12,259,926 | 12,203,822 | 0.46% |
| Sanno Hotel (NEF)[b] | 2,115,218 | 227,583 | 2,342,802 | 2,048,168 | 14.39% |
| Sasebo (NOF)[b] | 3,393,320 | 718,565 | 411,886 | 6,971,690 | −94.09% |
| Yokosuka (FA)[m] | 37,498,976 | 12,083,307 | 49,582,283 | 44,205,285 | 12.16% |
| **Japan Totals** | **$51,878,040** | **$16,418,855** | **$64,596,897** | **$65,428,965** | **−1.27%** |

*Notes:* [m]Main Exchange; [b]Branch Exchange

## Marianas Islands

| Store | FY 84 $ Sales | | | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| Guam (NS)[m] | 37,085,477 | 10,138,482 | 47,223,960 | 45,182,078 | 4.52% |

*Notes:* [m]Main Exchange; [b]Branch Exchange

## Newfoundland

| Store | FY 84 $ Sales | | | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| Argentia (NF)[m] | 970,154 | 301,348 | 1,271,503 | 1,408,010 | −9.70% |

*Notes:* [m]Main Exchange; [b]Branch Exchange

## NAVRESSO Exchange Sales—FY 84

### New Zealand

| Store | FY 84 $ Sales<br>Retail | <br>Services & Other | <br>Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Christchurch (NSFAD)[m] | 543,522 | 20,792 | 564,314 | 672,453 | −16.08% |

*Notes:* [m]Main Exchange, [b]Branch Exchange

### Philippines

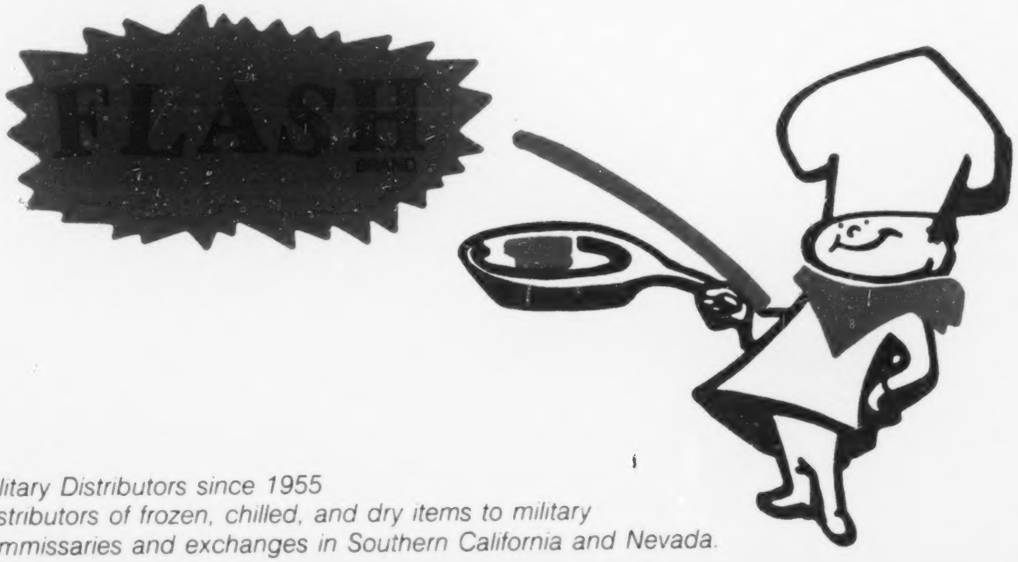
| Store | FY 84 $ Sales<br>Retail | <br>Services & Other | <br>Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Cubi Point (NAS)[b] | 5,926,180 | 3,027,945 | 8,954,126 | 8,695,619 | 2.97% |
| San Miguel (NCS)[b] | 1,912,592 | 721,750 | 2,634,343 | 2,623,898 | 0.40% |
| Subic Bay (NS)[m] | 34,158,603 | 10,889,675 | 45,048,278 | 42,935,830 | 4.92% |
| **Philippines Totals** | **$41,997,375** | **$14,639,370** | **$56,636,747** | **$54,255,347** | **+4.39%** |

*Notes:* [m]Main Exchange, [b]Branch Exchange

### Portugal

| Store | FY 84 $ Sales<br>Retail | <br>Services & Other | <br>Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Lisbon (NSUH)[b] | 659,103 | −0− | 659,103 | 581,641 | 13.32% |

*Notes:* [m]Main Exchange, [b]Branch Exchange



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FLASH STEAK COMPANY, INC.

7959 Paramount Boulevard, Pico Rivera, CA 90660 (213) 949-2558 Contact: Chris M. Sanchez (15)

# NAVRESSO Exchange Sales—FY 84

## Puerto Rico

| Stor | FY 84 $ Sales Retail | FY 84 $ Sales Services & Other | FY 84 $ Sales Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Roosevelt Roads (NS)[m] | 16,351,811 | 5,163,960 | 21,515,772 | 20,703,825 | 3.92% |
| Sabana Seca (NSGA)[b] | 3,072,294 | 309,153 | 3,381,447 | 3,206,569 | 5.45% |
| **Puerto Rico Totals** | **$19,424,105** | **$5,473,113** | **$24,897,219** | **$23,910,394** | **+4.13%** |

*Notes:* [m] Main Exchange; [b] Branch Exchange

## Spain

| | FY 84 $ Sales Retail | FY 84 $ Sales Services & Other | FY 84 $ Sales Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Rota (NS)[m] | $18,665,512 | $6,941,137 | $25,606,650 | $25,736,352 | **−0.50%** |

*Notes:* [m] Main Exchange; [b] Branch Exchange

## United Kingdom

| Store & Country | FY 84 $ Sales Retail | FY 84 $ Sales Services & Other | FY 84 $ Sales Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Brawdy (NF), Wales | 667,652 | 232,402 | 900,055 | 1,026,652 | −12.33% |
| Edzell (NSGA), Scotland | 2,067,499 | 497,351 | 2,564,851 | 2,563,095 | 0.07% |
| Holy Loch (NA), Scotland | 3,137,589 | 342,484 | 3,480,074 | 3,457,399 | 0.66% |
| London (NAUK), England | 1,292,101 | 165,077 | 1,457,179 | 1,708,753 | −14.72% |
| Machrihanish (NAWF), Scotland | 215,319 | 22,394 | 237,714 | 276,156 | −13.92% |
| St. Mawgan (NAWF), England | 309,865 | 112,806 | 422,672 | 452,339 | −6.56% |
| Thurso (NCS), Scotland | 492,054 | 59,063 | 551,117 | 572,737 | −3.77% |
| West Ruislip, London (NA), England | 2,162,954 | 303,403 | 2,466,357 | 2,456,445 | 0.40% |
| **United Kingdom Totals** | **$10,345,033** | **$1,734,980** | **$12,080,019** | **$12,513,576** | **−3.46%** |

## West Indies

| Store | FY 84 $ Sales Retail | FY 84 $ Sales Services & Other | FY 84 $ Sales Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Antigua (NF)[b] | 662,305 | 128,271 | 790,577 | 827,076 | −4.41% |

*Note:* [b] Branch Exchange

## Totals

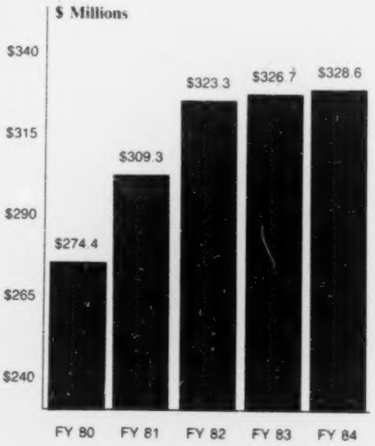
| | FY 84 $ Sales Retail | FY 84 $ Sales Services & Other | FY 84 $ Sales Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| **Overseas Totals** | **$318,524,171** | **$99,636,333** | **$414,460,527** | **$408,562,392** | **+1.44%** |
| **Worldwide Totals** | **$1,081,619,999** | **$426,125,333** | **$1,505,048,398** | **$1,460,774,924** | **+3.03%** |

# Marine Corps Exchange Sales—FY 84

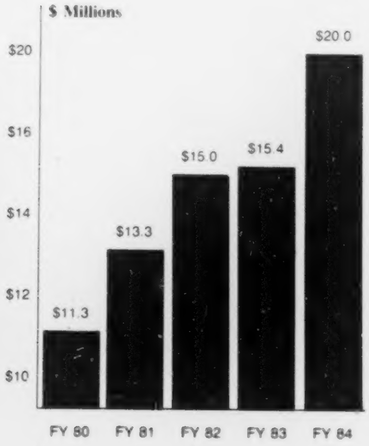
## Continental U.S.

| Store | FY 84 $ Sales Retail | FY 84 $ Sales Services & Other | FY 84 $ Sales Total | Total $ Sales FY83 | Total Sale % Change 84 vs 83 |
|---|---|---|---|---|---|
| Albany, GA | 4,179,485 | 237,361 | 4,416,846 | 4,617,609 | −4.35% |
| Barstow, CA | 2,253,728 | 372,579 | 2,626,307 | 2,368,338 | 10.89% |
| Camp Elmore, VA | 5,195,673 | 148,381 | 5,344,054 | 5,095,477 | 4.88% |
| Camp Lejeune, NC | 63,610,128 | 1,555,663 | 65,165,791 | 64,520,217 | 1.00% |
| Camp Pendleton, CA | 61,873,984 | 7,804,862 | 69,678,846 | 71,108,844 | −2.01% |
| Cherry Point, NC | 20,960,756 | 1,180,785 | 22,141,541 | 20,084,222 | 10.24% |
| El Toro, CA | 43,731,608 | 856,949 | 44,588,557 | 42,011,036 | 6.14% |
| Henderson Hall, VA | 11,336,047 | 449,767 | 11,785,814 | 12,472,983 | −5.51% |
| Parris Island, SC | 23,503,200 | 1,527,351 | 25,030,551 | 22,282,101 | 12.33% |
| Quantico, VA | 34,694,099 | 1,595,197 | 36,298,296 | 34,282,061 | 5.86% |
| San Diego, CA | 29,677,864 | 2,367,878 | 32,045,742 | 33,960,374 | −5.64% |
| Twentynine Palms, CA | 20,225,749 | 901,192 | 21,126,941 | 21,110,614 | 0.08% |
| Yuma, AZ | 7,370,080 | 1,086,625 | 8,456,705 | 8,157,011 | 3.67% |
| **CONUS Totals** | **$328,612,401** | **$20,084,590** | **$348,696,991** | **$342,070,887** | **+1.94%** |

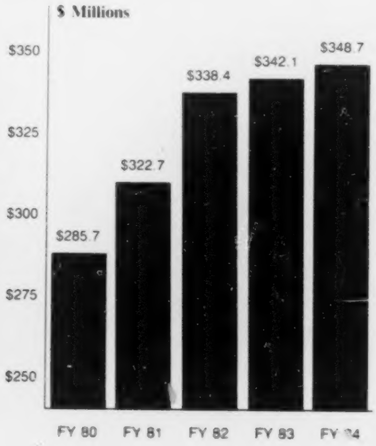
**5-Year Retail Sales Summary**
**Marine Corps CONUS Exchanges**



**5-Year Services Sales Summary**
**Marine Corps CONUS Exchanges**



**5-Year Total Sales Summary**
**Marine Corps CONUS Exchanges**

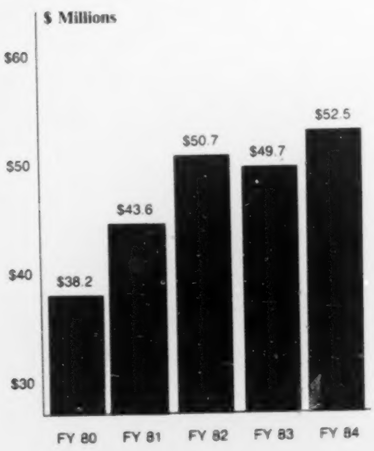


## Overseas

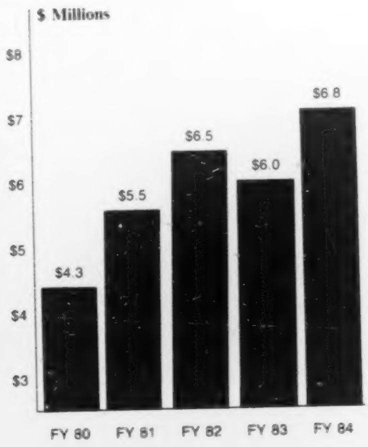
| Store | FY 84 $ Sales Retail | FY 84 $ Sales Services & Other | FY 84 $ Sales Total | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| Guantanamo Bay, Cuba | 4,929,327 | 164,863 | 5,094,190 | 4,892,756 | 4.12% |
| Iwakuni, Japan | 12,151,310 | 4,083,661 | 16,234,971 | 15,073,515 | 7.71% |
| Kaneohe Bay, HI | 31,754,095 | 2,290,725 | 34,044,820 | 32,568,956 | 4.53% |
| Rodman (Canal Zone), Panama | 3,661,320 | 276,139 | 3,937,459 | 3,178,793 | 23.87% |

# Marine Corps Exchange Sales—FY 84

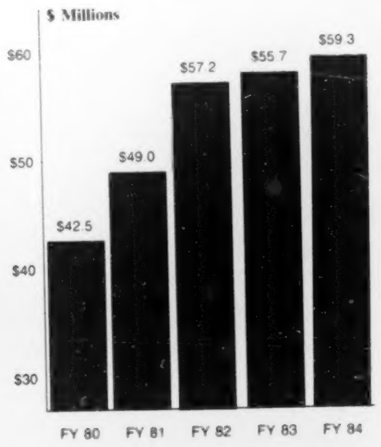
5-Year Retail Sales Summary
Marine Corps Overseas Exchanges



5-Year Services Sales Summary
Marine Corps Overseas Exchanges



5-Year Total Sales Summary
Marine Corps Overseas Exchanges



## Totals

| | FY 84 $ Sales | | | Total $ Sales FY83 | Total Sales % Change 84 vs 83 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| Overseas Totals | 52,496,052 | 6,815,388 | 59,311,440 | 55,714,020 | 6.46% |
| Worldwide Totals | $381,108,453 | $26,899,978 | $408,008,431 | $397,784,907 | +2.57% |

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Futura
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# Cornucopia Unbound:

## *A Potpourri Of New Products*

*Also in this Issue:*

- Health & Beauty Aids
- Consumer Electronics
- EDI Update

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# Interservice IS

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HEALTH & BEAUTY AIDS MARKETING

# More Than Skin Deep

BY MARIE KRAKOW

## A report on the latest trends in health and beauty aids marketing.

**There's still sparkle in unit and dollar volume increases.**

Sales of health and beauty aid (HBA) products lost the razzle-dazzle growth they enjoyed a few years ago, but there's still some sparkle in the category's unit and dollar volume increases for the first quarter of 1985.

The latest available figures from Towne-Oller & Associates, which measures movement of HBA items from warehouses to retail food stores, shows that the category grew by 3.5 percent in unit volume and 8.1 percent in dollar volume compared to the same period last year.

Selling Areas-Marketing, Inc. (SAMI), which measures warehouse movement of HBA items to drug stores and mass outlets as well as to food stores, registered a lower 1.6 percent unit volume increase and a 7.6 percent dollar volume increase, according to Alan B. Miller, Jr., vp, sales-services.

By either of these indices, it is clear that HBA as a category has lost a lot of ground from its high-water mark of 16.5 percent growth in 1981. Yet the outlook for HBA sales, particularly for low-priced products and high-priced prestige products, is brighter than it might appear at first glance.

The news may not be so good for HBA items in the mid-price range, however, according to Diana K. Temple, research analyst at Salomon Brothers, Inc., New York.

### The Rich Get Rich . . . And The Poor Get Poorer

According to Ms. Temple, both lower-income and higher-income households are on the rise, while the middle class occupies a wider plateau and is beset by dwindling purchasing power.

"The result of this polarization of purchasing power is a bimodal distribution of growth within the cosmetics industry – that is, the success in upscale brands, the waning of mid-priced brand franchises and the surge of low-priced products," she explained.

"In cosmetics, lower-priced brands such as Noxell's Cover Girl have enjoyed 20 percent growth, while the two industry leaders, Avon and Revlon, have found it difficult to post even 5 percent gains," Ms. Temple noted. At the same time upscale skin care lines experienced strong gains in department store sales.

Although there are currently no reliable statistics available to prove this theory as it applies to sales in military commissaries and exchanges, a number of military sales directors from HBA companies described situations that seem to support Ms. Temple's theory.

For instance, at Revlon Government Sales, the independent division of Revlon which sells exclusively to the military, director of retail promotions Carol Healy

*Marie Krakow is a Princeton Junction, NJ-based freelance writer. She is a former business publications editor who has written widely about food and non-food retailing subjects.*

ILLUSTRATION BY ROBYN EWING

AT EASE MEN!

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twenty-four hours.
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for twenty-four hours.
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noted a 17 percent growth in the exchanges for Revlon's Ultima II prestige skin care line, compared to rather "flat" sales in the commissaries for mid-priced lines like Moondrops, which are sold under the Revlon name.

At American Cyanamid, director of military sales James N. Anagnost said the company enjoyed increases in its prestige Jacqueline Cochran fragrances sold in exchanges this year, but not in its mid-priced Breck product line or even in its familiar masculine Old Spice aftershave line which is popular in the military.

However, the military sales director at one major company, which Ms. Temple said was going through a "difficult environment" due to below-average growth in mid-priced products, objected: "This bimodal theory is not true at all in the military. All our products are pretty much in the mid-price category and we're doing very well in both classes of trade." He asked not to be identified, but claimed that his firm's military sales growth in dollars was between 10 percent and 15 percent this year for its popular line of mid-priced hand lotions, cold creams, and cotton-tipped swabs.

Low prices on HBA items continue to be a big drawing card for the category in military stores. Compared to the high mark-ups on HBA items in civilian stores, the military's mandate in the commissaries of selling at cost plus a 5 percent surcharge gives even mid-priced lines a competitive advantage comparable to "loss leaders" featured in civilian drug stores and outlets.

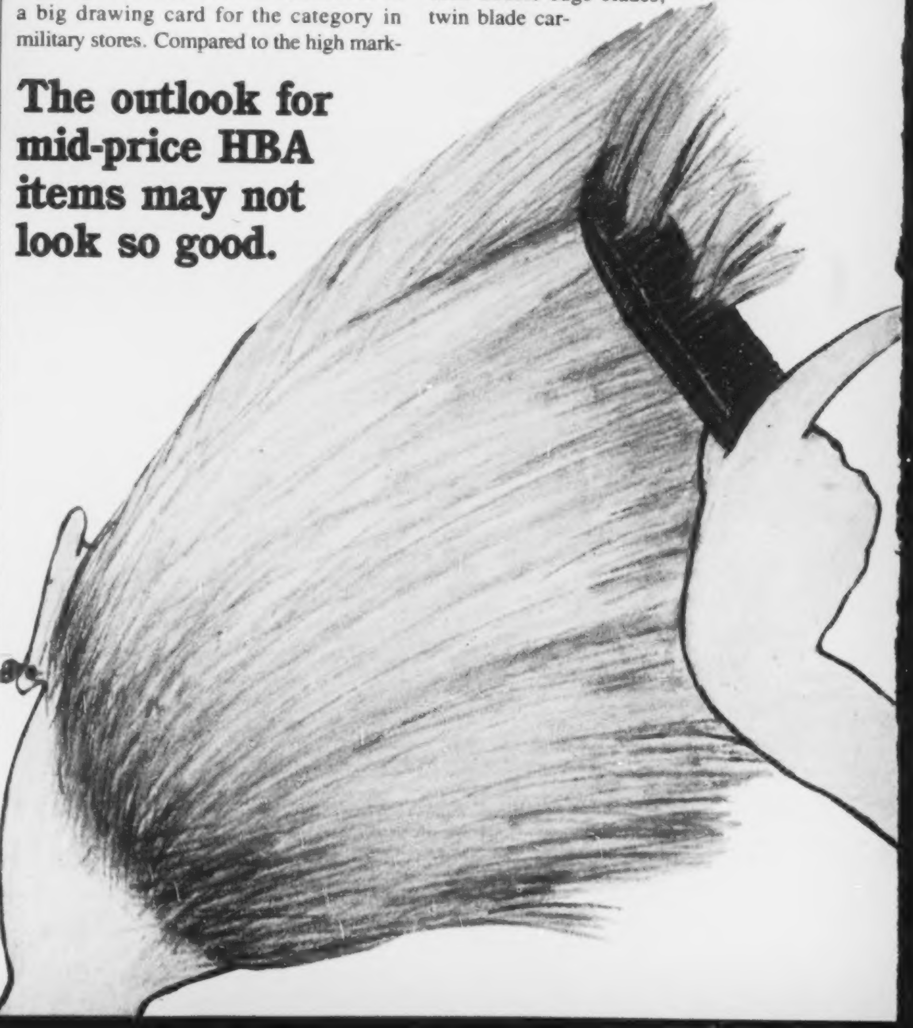
## HBA Growth Leaders For 1985

Hair styling products, bolstered by the spectacular success of mousse foams, are the leading HBA growth category as measured by Towne-Oller & Associates for the 12 months ended in March 1985, according to Towne-Oller's manager of sales analysis, Marianne Sommer. The category increased by a spectacular 374.8 percent in that period.

Other major HBA growth categories over the same 12 months include: eye make-up kits, 243.3 percent; menstrual analgesics, 185.8 percent; arthritic analgesics, 144.1 percent; shave preparations, 108.9 percent; and lice treatments, 101.2 percent.

Disposable razors are doing well in military sales. One company in this line is American Safety Razor. Besides its national brands (Flicker, Gem, and Personna), it sells double edge blades, twin blade car-

**The outlook for mid-price HBA items may not look so good.**



tridges, injector blades, auto adjusting cartridges, and pivoting twin blade disposables to exchanges, all under the AAFES private label, according to William Robbins, director of private label sales and marketing.

Mr. Robbins adds that his company is also currently selling twin blade cartridges, auto adjusting cartridges, and pivoting twin blade disposables to NAVRESSO under the Navy Exchange brand program. He says that two additional items—double edge blades and fixed head disposable razors—are being added to Navy's assortment in September 1985.

## Shelf Space Problems

As a category, HBA is marked by a dizzying array of new product entries, sometimes more than 400 in a single year. In the military resale market, which has frustratingly limited shelf space to begin with to suit most manufacturers, this poses some thorny stock selection problems.

The military frequently uses data from Towne-Oller and SAMI, both of which track warehouse movement, as well as the syndicated audits from the A.C. Nielsen Co., which track retail movement of HBA items in food, drug, and mass outlets.

Military emphasis is on picking only those HBA products with the highest market share as well as appropriate pricing and promotion. Commissaries, for example, won't handle high-priced items like prestige skin care or fragrance products.

In a category swollen with more than 1,200 shampoo products alone, the military has little inclination to stock any but the best selling products in a given line.

This sometimes rankles HBA manufacturers like Neal A. Harris, Jr., director of military and broker sales for Johnson Products Co., which makes hair care products for blacks.

### HBA Growth Categories
## $ Volume Increase Of 20% Or More
### 12 Months Ending March 1985

| | 1st Qtr Increase | 12 Mo Increase |
|---|---|---|
| **Analgesics—Arthritic** | +146.1% | +144.1% |
| **Menstrual** | +230.7 | +185.8 |
| **Baby Baths** | +19.3 | +20.0 |
| **Bubble Baths—Dry** | +36.7 | +23.6 |
| **Calamine Products** | +27.4 | +23.5 |
| **Contact Lens Preparations** | +30.9 | +32.3 |
| **Contact Lens Preps—Soft** | +37.4 | +40.7 |
| **Ear Medications** | +17.6 | +22.3 |
| **Elastic Bandages & Braces** | +113.2 | +88.8 |
| **Eye Makeup Products** | +12.9 | +25.2 |
| **Eye Liners** | +51.3 | +73.4 |
| **Eye Shadows** | +3.1 | +20.1 |
| **Eye Makeup Kits** | −17.8 | +243.3 |
| **Mascara** | +12.7 | +20.2 |
| **Mascara Removers** | +23.8 | +36.1 |
| **Face Makeups** | +25.0 | +33.6 |
| **Fragrances—Women** | +53.4 | +59.2 |
| **Hair Styling Products** | +197.3 | +374.8 |
| **Implements** | +17.3 | +28.6 |
| **Lice Treatments** | +33.4 | +101.2 |
| **Lipsticks** | +104.1 | +25.2 |
| **Nail Polishes** | +23.0 | +21.3 |
| **Pregnancy Test** | +47.7 | +36.3 |
| **Red. Aids Diet Meal Replace.** | −12.4 | +72.4 |
| **Shave Preps—Tubes & Cups** | +203.4 | +108.9 |
| **Stimulants** | +23.8 | +26.4 |

*Source:* Towne-Oller & Associates.

Over the past year, Johnson Products has increased its business by an impressive 300 percent with the commissaries, doing especially well overseas. Admittedly this 300 percent growth came from a low base. Overall, the company experienced about a 2 percent to 3 percent growth rate in military sales, due largely to inventory cutbacks by the exchanges.

**HBA as a category has fallen from its high-water mark of growth in 1981.**

"One of the problems we have is that in spite of the $385 million ethnic hair care market, the military still has a nonprofessional attitude about the product," says Mr. Harris. "Even though our company and three or four others in the field do upwards of $40 million a year in sales, we still have to go to them and prove that we belong on the military shelf, which is highly insulting.

"Even when you use Towne-Oller or A.C. Nielsen data, you still have to go through an attitudinal problem. Many times you go on a military base and they say 'We'll take just your best item or your fastest moving item.' They don't understand that if black patrons buy a curl product, they need a moisturizer, an activator, and a shampoo with it."

Limiting the shelf stock in this way does not give black military patrons the choice of the products they use, Mr. Harris maintains.

A military sales manager at another HBA manufacturer complained that despite the popularity of mousse products in the hair styling category, the Army and Air Force Exchange Service (AAFES) hasn't approved his company's mousse product for its stock assortment yet except for one-time buys in the exchange regions.

Four of the five exchange regions that took the product on a one-time buy sold out and one came back for more, he claims, yet headquarters AAFES hasn't approved it, even though it's doing "exceptionally well" in the commissaries. "Sometimes I don't know *how* the military makes its stock selection decisions," he sighed.

## Trends And New Entries

Mousse is far and away the hottest-selling new HBA item in military commissaries and exchanges, just as it is in the civilian sector.

Developed and introduced as Freehold Mousse by French-based L'Oreal, this copolymer hair styling foam which launched a $150 million category was itself launched in a rather intriguing way.

L'Oreal's American subsidiary, Cosmair, began quietly buying up the existing European supply of customized aerosol cans two years ago. When L'Oreal introduced Freehold Mousse, it got a six-month head start on its competitors; rival firms had to replenish this can supply before they could package – and introduce – their own versions of the product.

**Mousse is by far and away the best-selling new HBA item.**

In the toothpaste category, the best selling items are toothpaste gels and toothpastes in pump dispensers. Other new items expected to be hot sellers in the military this year will be the plaque-fighting and tartar-fighting toothpastes being introduced by Colgate Palmolive and Procter & Gamble respectively.

Colgate will be first to introduce its plaque-fighting entry, Dentagard, to the military, according to George Cominskie, military product manager.

He attributes his company's recent success to Colgate Palmolive's also being first to introduce a gel and a pump dispenser. Colgate toothpaste advanced 57 percent between 1980-84 at a time when the toothpaste category overall grew 28 percent, he noted.

In fact, the champagne corks were popping at Colgate Palmolive when SAMI four-week share figures for March were released. For the first time in 28 years, Colgate toothpaste beat its arch-rival, Procter & Gamble's Crest, as the number-one brand in 37 markets.

In the skin care category, there is an industry trend toward therapeutic or "treatment" products which make scientific claims. One analyst called them the "fix and repair approach to aging." These types of products are also becoming popular in the military, at least in exchanges where prestige lines are sold.

## Health Care Share Trends

| By $ Volume | 1st Qtr '84 | 1st Qtr '85 | % Change |
|---|---|---|---|
| **Analgesics Non-Efferv.** | 29.6% | 29.4% | +10.1% |
| **Sinus Analgesics** | 2.1 | 2.0 | +7.1 |
| **Asthmatic Remedies** | 0.5 | 0.6 | +18.3 |
| **Cold Caps., Liq. & Tabs.** | 15.9 | 16.7 | +16.3 |
| **External Analgesics** | 2.1 | 1.9 | −2.2 |
| **Cough Medications** | 5.4 | 5.8 | +19.6 |
| **Nasal Sprays** | 2.8 | 3.0 | +15.0 |
| **All Other Cold Medicines** | 9.8 | 9.9 | +12.2 |
| **Sore Throat Remedies** | 4.5 | 4.7 | +14.7 |
| **Hemorrhoidal Preps.** | 1.1 | 1.0 | +6.3 |
| **Laxatives** | 4.3 | 4.1 | +5.8 |
| **Upset Stomach Remedies** | 10.3 | 9.9 | +6.2 |
| **Vitamins & Tonics** | 11.6 | 10.9 | +4.0 |
| **Total Health Care (% of Total HBA's)** | **33.8** | **34.6** | **+10.5** |
| **Total Health & Beauty Aids** | | **100.0%** | **+8.1** |

*Source:* Towne-Oller & Associates.

## Cosmetic Share Trends

| By $ Volume | 1st Qtr '84 | 1st Qtr '85 | % Change |
|---|---|---|---|
| **Colognes – Men** | 4.1% | 3.7% | +7.2% |
| **Fragrances – Women** | 2.9 | 3.8 | +53.4 |
| **Mascaras** | 14.0 | 13.4 | +12.7 |
| **Shadows** | 14.2 | 12.4 | +3.1 |
| **Liners** | 4.0 | 5.1 | +51.3 |
| **All Other Eye Makeups** | 3.2 | 3.0 | +9.3 |
| **Face Makeups** | 21.2 | 22.5 | +25.0 |
| **Lipsticks** | 14.3 | 13.8 | +13.6 |
| **Nail Polishes** | 10.9 | 11.4 | +23.0 |
| **Nail Polish Removers** | 7.3 | 6.7 | +8.1 |
| **All Other Nail Care** | 3.9 | 4.2 | +24.9 |
| **Total Cosmetics (% of Total HBA's)** | **3.8** | **4.1** | **+17.7** |
| **Total Health & Beauty Aids** | | **100.0%** | **+8.1** |

*Source:* Towne-Oller & Associates.

## Hand Preparations Share Trends

| By $ Volume | 1st Qtr '84 | 1st Qtr '85 | % Change |
|---|---|---|---|
| **Aloe** | 10.0% | 9.7% | +6.7% |
| **Total Hand Preparations** | | | **+9.5** |
| **Total Health & Beauty Aids** | | **100.0%** | **+8.1** |

*Source:* Towne-Oller & Associates.

Revlon's biggest entry in this category is the new Ultima II treatment product, Pro-Collagen, which Carol Healy says has been a "major success" in the exchanges. (Collagen, a protein substance, is the ingredient many cosmetic companies are putting in upscale skin care products to treat dry, wrinkle-prone areas of the face, especially around the eyes and mouth.) According to Ms. Healy, it is the "biggest, biggest entry in all the cosmetic counters today."

Protective lip treatments also have become popular. Elizabeth Arden's premium-priced Lip-Fix Creme is a well-known high-priced entry. At AAFES the number-one selling HBA product (in all categories) is the lower-priced Chap Stick Lip Balm.

> **Color analysis for women is another trend affecting cosmetic marketing.**

Color analysis which categorizes women into four color types or "seasons" is another trend affecting cosmetic marketing to military patrons.

Over the past year and a half, Revlon Government Sales has totally separated all its colors by seasons. A customer only has to mention which season she is, to receive a chart of every product Revlon makes in her colors. (In conjunction with this,

## Pouring It On

According to Martin J. Friedman, editor of Dancer Fitzgerald Sample's *New Product News*, an industry monitor on new food and health products, 261 new HBA items were introduced to the market over the first six months of 1985. That rate is well above comparable figures covering the same periods of 1983 and 1984.

**New HBA Products**

| Over 1st 6 mos. | Number Introduced |
|---|---|
| 1985 | 261 |
| 1984 | 205 |
| 1983 | 174 |

| Over Year | Number Introduced |
|---|---|
| 1984 | 411 |
| 1983 | 362 |
| 1982 | 369 |

Revlon runs promotions where it hires color analysts to tell exchange customers which color seasons they are.)

This is done strictly in the military, according to Carol Healy; Revlon's civilian customers don't yet have this service.

In the vitamin category, which the Air Force Commissary Service (AFCOMS) singled out as one of its biggest HBA growth areas this year, the "rage" now is for oyster shell calcium supplements, according to Bundy Vitamin Co. president Gordon Bundy. The trend is evidently fueled by an increasing understanding of calcium's role in preventing osteoporosis.

One trend that seems *not* to have fully emerged, either in the civilian or military markets, is sales of specialty cosmetics and skin care products for men. "Boy George may use cosmetics but the American male does not," quipped Salomon Brothers' analyst Temple.

She believes men more commonly use products purchased primarily by women. For example, 52 percent of men report using hand lotion regularly, although there are no brands specifically for men.

## Advertising And Promotion

Introducing a new HBA product today can mean high costs, high risks, or heavy losses. Competition is forcing advertising budgets to equal or even exceed projected first year sales for some fragrance and cosmetics products, for instance.

Military sales directors say the most effective promotions for HBA products in commissaries and exchanges are the familiar standbys—coupons, voluntary price reductions (VPRs), and print media ads and coupons in military publications.

**The military has little inclination to stock any but the best-selling lines.**

Although these are standard-fare approaches, companies are pouring money into them. "We're spending more aggressively than ever before in our military advertising and promotions," a military sales director from a major HBA company admitted.

Standard or not, these promotions to the military can have their frustrating moments for some. One military sales manager complained that when he gives VPRs to ex-

## Deodorants Share Trends

| By $ Volume | 1st Qtr '84 | 1st Qtr '85 | % Change |
|---|---|---|---|
| Anti-Perspirant Aerosol | 17.6% | 17.0% | 0% |
| Deodorant—Aerosol | 11.0 | 8.8 | −16.9 |
| Powder—Aerosol | 3.5 | 3.4 | +0.5 |
| **Aerosol Subtotal** | **32.1** | **29.2** | **−5.7** |
| Roll-Ons | 29.1 | 29.0 | +29.0 |
| Sticks | 35.9 | 39.3 | +13.2 |
| Creams | 2.2 | 2.0 | −5.5 |
| Pump Sprays | 0.5 | 0.3 | −34.5 |
| Pads | 0.1 | 0.1 | −10.4 |
| Squeeze Sprays | 0 | 0 | +6.1 |
| **Non-Aerosol Subtotal** | **67.9** | **70.8** | **+7.9** |
| **Total Deodorants** | | **100.0%** | **+3.5** |

*Source:* Towne-Oller & Associates.

## Hair Care Share Trends

| By $ Volume | 1st Qtr '84 | 1st Qtr '85 | % Change |
|---|---|---|---|
| Ethnic Hair Preps | 4.2% | 4.0% | +1.8% |
| Hair Coloring Products | 6.3 | 5.8 | −1.3 |
| Hair Conditioners & Rinses | 17.3 | 16.9 | +3.0 |
| Hair Dressing—Women | 0.4 | 0.4 | −0.5 |
| Hair Preparations—Men | 4.0 | 3.8 | +2.9 |
| Hair Sprays | 15.0 | 15.2 | +7.6 |
| Hair Styling Products | 2.1 | 5.9 | +197.3 |
| Permanent Wave Kits | 1.6 | 1.5 | −0.2 |
| Shampoos | 49.1 | 46.3 | −0.2 |
| **Total Hair Care (% of Total HBA's)** | **17.7** | **17.3** | **+5.8** |
| **Total Health & Beauty Aids** | | **100.0%** | **+8.1** |

*Source:* Towne-Oller & Associates.

## Antacids Share Trends

| By $ Volume | 1st Qtr '84 | 1st Qtr '85 | % Change |
|---|---|---|---|
| Liquids | 49.9% | 49.3% | +7.8% |
| Tablets | 49.3 | 50.0 | +10.6 |
| Others (Gum, Granules) | 0.9 | 0.8 | −3.9 |
| **Total Antacids** | | **100.0%** | **+9.1** |

*Source:* Towne-Oller & Associates.

## Shaving Needs Share Trends

| By $ Volume | 1st Qtr '84 | 1st Qtr '85 | % Change |
|---|---|---|---|
| **Shave Preps – Aerosol** | 21.8% | 19.7% | −9.2% |
| **Shave Preps – After** | 9.2 | 9.5 | +3.9 |
| **Shave Preps – Pre** | 1.7 | 1.7 | +0.1 |
| **Shave Preps – Tubes – Cups** | 0.6 | 1.7 | +203.4 |
| **Razor Rack** | 66.7 | 67.4 | +1.4 |
| **Total Shaving Needs (% Total HBA's)** | **5.9** | **5.5** | **+0.4** |
| **Total Health & Beauty Aids** | | **100.0%** | **+8.1** |

*Source:* Towne-Oller & Associates

## Skin Care Share Trends

| By $ Volume | 1st Qtr '84 | 1st Qtr '85 | % Change |
|---|---|---|---|
| **Face Creams & Lotions** | 29.5% | 27.4% | −0.5% |
| **Acne Preparations** | 20.1 | 19.7 | +4.5 |
| **Hand Lotions** | 35.4 | 35.9 | +8.6 |
| **Hand Creams** | 1.9 | 2.3 | +25.0 |
| **Baby Lotions** | 3.5 | 3.0 | −6.5 |
| **Specialty Soaps** | 3.6 | 3.9 | +15.9 |
| **Suntan/Sunscreen Products** | 5.9 | 7.8 | +40.3 |
| **Total Skin Care (% of Total HBA's)** | **5.5** | **5.5** | **+7.1** |
| **Total Health & Beauty Aids** | | **100.0%** | **+8.1** |

*Source:* Towne-Oller & Associates

## Oral Hygiene Share Trends

| By $ Volume | 1st Qtr '84 | 1st Qtr '85 | % Change |
|---|---|---|---|
| **Breath Fresheners** | 1.0% | 1.0% | +11.4% |
| **Dental Floss & Tape** | 2.1 | 2.1 | +12.7 |
| **Dentifrices** | 51.9 | 53.5 | +13.5 |
| **Denture Adhesives** | 4.6 | 4.2 | +2.5 |
| **Denture Cleansers** | 5.9 | 5.2 | −2.2 |
| **Lip Medications** | 2.9 | 3.0 | +13.1 |
| **Mouthwashes** | 21.2 | 20.9 | +8.6 |
| **Toothache & Teething Remedies** | 1.3 | 1.4 | +17.8 |
| **Toothbrushes** | 9.2 | 8.6 | +2.0 |
| **Total Oral Hygiene (% of Total HBA's)** | **14.3** | **14.6** | **+10.0** |
| **Total Health & Beauty Aids** | | **100.0%** | **+8.1** |

*Source:* Towne-Oller & Associates

changes, "They'll run them for three or four days and then put the prices back up to regular price, even though they've taken in maybe three months' supply." Civilian outlets, in contrast, run their promotional prices until the product sells out.

Because of limited space, it is also difficult to get any kind of specialized in-store merchandising fixtures for HBA products in the exchanges, except for sunglasses, which AAFES allows to be displayed on vendor-supplied racks.

AAFES does care about HBA promotions, though, since it gleans 8.1 percent of its total sales from the category. An AAFES spokesman explained, "Competition in HBA items with major discounters is so important that AAFES regularly reviews and revises its key products to stay competitive. And all these items are included in the 'Extra Value' program."

**Low prices in military stores continue to be a drawing card.**

AAFES is also said to be considering letting its five individual regions have more discretion in making one-time buys and in-store promotions without authorization from headquarters in Dallas.

But if you're looking for special point-of-purchase displays for your HBA products, you'll probably do better at the commissaries. Johnson Products Company, for instance, is joining with about three other ethnic hair care companies in setting up a planogram approved for use by both Army and Air Force commissaries. It's coming in on an introductory basis with about 40 products and will include those of additional firms later.

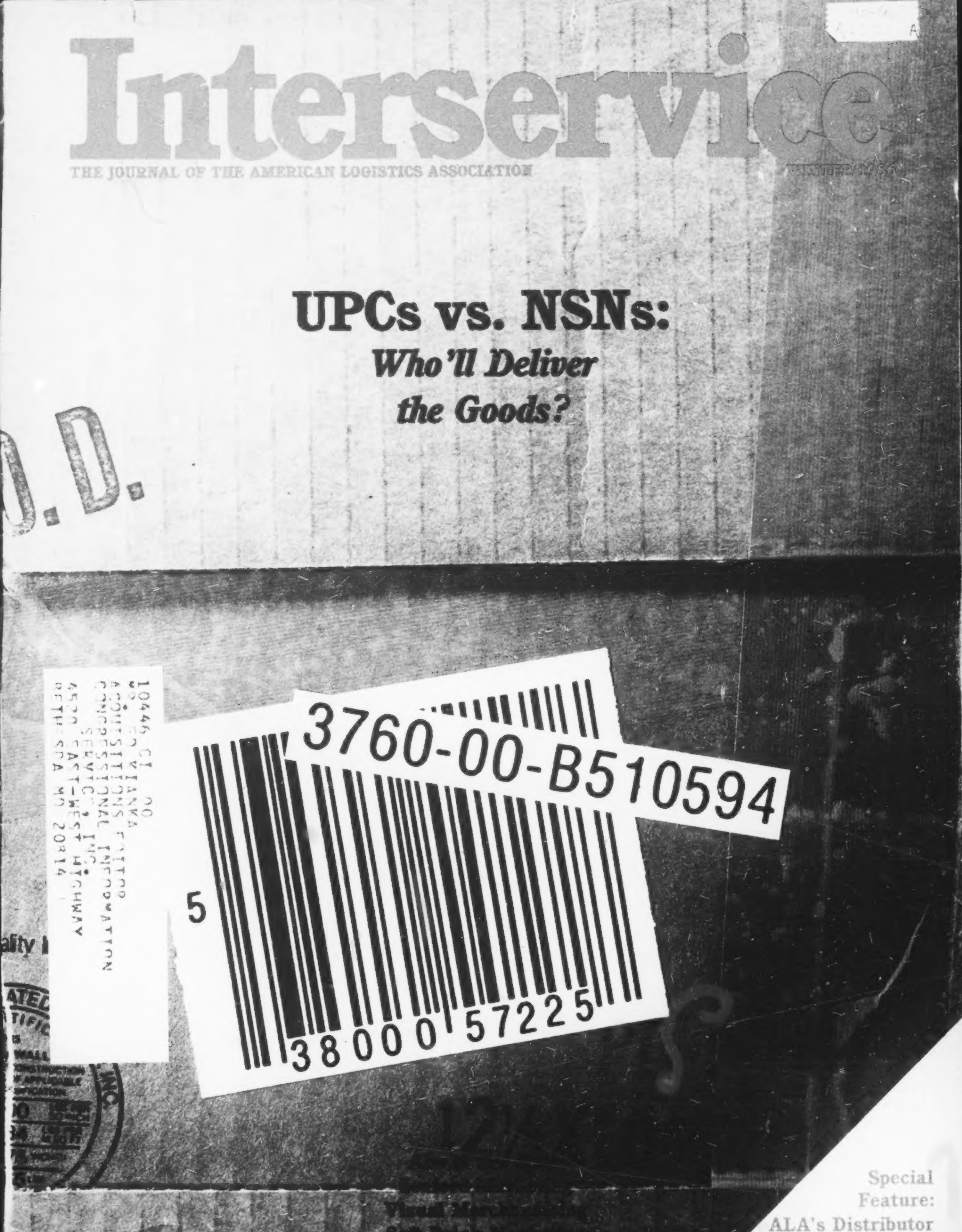
Ongoing specialty promotions to the military include efforts like Colgate Palmolive's "Best Buys on Base" promotions twice a year, plus themed "Cute Kid" and Superbowl contests. Revlon relies heavily on educational promotions. For example, it brings beauty advisers on base to hold clinics where customers can learn first-hand how to use the product.

HBA manufacturers plainly have a good customer in military resale outlets. Said one cautious HBA executive, who was clearly guarding his turf: "I don't *want* to say in an article how much we sell to the military. Every time that happens, the next morning you get ten companies who say, 'The military's where I want to be.'" ■

# Interservice

THE JOURNAL OF THE AMERICAN LOGISTICS ASSOCIATION

WINTER 1986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## UPCs vs. NSNs:

### *Who'll Deliver the Goods?*

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MS ED VIANKA
ACQUISITIONS EDITOR
CONGRESSIONAL INFORMATION
SERVICE, INC.
4520 EAST-WEST HIGHWAY
BETHESDA MD 20814

Visual Merchandising
Soft Drink [illegible]

Special
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Directory

PUBLISHED BY THE AMERICAN LOGISTICS ASSOCIATION

# Interservice

THE QUARTERLY JOURNAL FOR THE INTERNATIONAL AND MILITARY MARKETING PROFESSION

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FISH & SEAFOOD MARKETING

# The Big Catch

## Why fish is winning consumers and what the military is doing to promote it

BY JOE COLEMAN

Try this for a fish story: You are sitting with Steven Susnjar, Military Sales Manager for Singleton Seafood Company, in his office in Tampa, FL. Hurricane Elena has just changed from a northwest to southeast direction toward Tampa, all the boats have been brought in from the Gulf, Steve's phones are constantly ringing, vice presidents of the firm drop by unexpectedly, and Steve tells you that he's been so damn busy the past few months that he hasn't had time to get a haircut. "I don't care what happens," he tells his secretary, "I don't care who is calling. I want time for a haircut."

A few miles away, Roger Anderson, momentarily the Executive Director of the Gulf South Atlantic Fisheries Development Foundation, Inc., has a topper. He's just quit his job to become a partner in Cox's Wholesale Seafood, he hasn't even had a chance to get to his new quarters and find a replacement for his present job, and he's received an attractive buyout offer. He could make a mint and retire at an early age. But he won't. "It's not just the money," he says, "it's the opportunity to work and accomplish something. You can buy a firm, but you can't always buy the people."

### Some Big Fish

Anderson says that as Executive Director of the Foundation, he would receive constant inquiries from food companies in Fortune's Top 500 as to what fish wholesalers and suppliers in the Gulf Area were available. "Take a look at these business cards," he says, "they are all from the *big* ones."

Of course, Anderson is referring to companies like Weyerhaeuser, General Mills, W.R. Grace, Zapata, and Pillsbury.

And it becomes clear that the big ones are going after the big catch: a much larger fish market with the military a prime and receptive target.

Take Singleton Seafood Company, the largest processor of shrimp in the United States, with catfish and flounder as added items. It's been purchased by ConAgra, a large food conglomerate in Omaha, NE.

Right now Singleton is test marketing a whole series of upscale new products called

*Joe Coleman is a Washington, D.C.-based freelance writer and author who has written several popular books published by the William Morrow Publishing Company.*

Golden Fleet in Los Angeles, Baltimore-Washington, Dallas, and Miami. When the products make their entrance, they'll have movie star Danny Thomas singing their virtues. Singleton's catfish don't have Danny Thomas, but they seem to be doing all right by themselves, at a present rate of 200 million pounds a year and growing at a 20 percent compound rate per year.

All this keeps Steven Susnjar busy as he travels from commissary to commissary explaining Singleton's new products and new developments. It's the main reason why he has a hard time finding the time to get a haircut.

Or take Van de Kamp's Frozen Foods. It has recently been bought out by Pillsbury, which seems to have been a smart move. Van de Kamp's Light Fillets and Today's Catch are helping to make Van de Kamp's the fastest growing fish company in the United States, and third in terms of volume only to Mrs. Paul's and Gorton's.

Pillsbury's Fred Eddowes, Director of Sales for Special Markets, says the secret to Van de Kamp's growth is that the fish is filleted and frozen on site. "It's fresher than fresh fish," he says.

Talk to other seafood marketers and you'll hear about more frenzied activity, such as the ten new huge catcher-processor ships that will travel up and down the east coast this spring catching and freezing anywhere from 40 to 50 metric tons of fish a day.

## Hush, Hush...

Who's buying the boats? That's a question east coast boat builders duck. It's confidential; it's secret.

What's going on, the experts say, is simply this: though U.S. consumption of fishery products set a record 13.6 pounds of edible meat per person last year, market growth has been seriously hampered by what has been a "cottage" industry with small and independent units, fishermen, wholesalers, distributors and suppliers.

Market growth has been hampered, too, by a lack of consumer education and information. Organization and promotion can reduce or eliminate these barriers, and with a great wealth of scientific data propounding the health benefits of fish, the market can be vastly expanded from present levels.

The experts say that the fish industry is today where the chicken industry was 25 years or so ago: thousands of independent barnyard operations. Modern chicken production is highly centralized, with a dozen or so corporations managing highly efficient chicken factories. And chicken consumption has grown steadily upward each year for the past two decades.

## The Big Climb

"'We have to face the harsh *reality* that the collapse in consumer taste for beef is permanent, and the beef industry is having to adjust to that low level of demand,' says Raymond Daniel, an economist at Chase Econometrics, of Bala-Cynwyd, PA. 'It's a declining industry, and the only question is how far it will decline.'" —*Wall Street Journal*, August 28, 1985.

"Despite the fact that we're experiencing the best economic climate we've seen in years, our industry is plagued by lagging consumer demand, flat rates and reduced earnings. Our earnings have dropped 20 percent ($100 million) in the past five years. And our net worth stopped growing. We must—and I believe we are—responding to these challenges." —C. Manly Molpus, President, American Meat Institute, in remarks to the Meat and Poultry Association of Hawaii, June 29, 1985.

As the above remarks indicate, these are not the best of times for the beef industry. According to the Agriculture Department, beef consumption peaked at 94.4 pounds per capita in 1976, and this year it will decline to about 76.5 pounds.

Still, advises Jen Knutson, American Meat Institute (AMI) economist, the figures aren't as bad as they appear: the beef industry works in cycles, peaks and valleys.

They are now in the valley, and they are doing their best to climb out, counting on good promotional materials, new products and other innovations to lead the way.

The sparkplug behind the AMI's promotional thrust is Sara Lilygren, AMI's manager of public relations.

The beef industry she says, is caught in a momentary culture trap: "What's light and white is in." Lilygren wants to turn that around to "what is red and lean is in" and, to do that, she has helped prepare volumes of materials for consumers, supermarkets, commissaries, and AMI members.

Reading these materials, you can find out all about National Meat Week, January 26–February 1, 1986, the economics of meat, meat facts, nutrifacts, and myths about meat.

Lilygren concedes that the beef industry is caught in a dilemma: Americans were brought up believing that the greater the fat, the better the taste. They still believe that at restaurants, where most prime cuts are delivered. But it's another story at supermarkets and commissaries, where lean but less tastier meats are constantly promoted and purchased.

The way out of the dilemma and the valley, she says, is new product development, and she talks about new product entries by Armour, Oscar Mayer, George Hormel, and Monfort of Colorado. She says that packaging of brand names on meat products should make consumers more aware of quality meat products.

The problem is that in new product entries, beef offerings fall far behind chicken and fish.

"We're probably lagging behind," she says, "but we're sure working like hell to catch up."

And she says that baby boomers, those born between 1947 and 1965, will help the industry catch up. A new AMI survey shows baby boomers are not as health conscious as their parents, not as concerned about health fads, and are more relaxed about life in general.

That comes as good news to the meat industry as it prepares for its big climb. —J.C.

## DPSC's 1984 Fish Purchases

**Total: $30 million**

| *Categories* | *$Value* | *Pounds* |
|---|---|---|
| Breaded Shrimp | 8,658,731 | 2,540,487 |
| Lobster Tails | 6,879,350 | 794,904 |
| Shrimp | 6,016,660 | 938,930 |
| Perch/Fillet | 3,376,232 | 1,496,848 |
| Fish Portions (Perch/Haddock) | 1,917,618 | 2,021,000 |
| Flounder/Fillet | 1,798,326 | 700,000 |
| Cod/Haddock Portions | 1,636,843 | 1,161,690 |
| Scallops (raw) | 1,553,391 | 261,700 |
| Oysters | 1,246,069 | 303,653 |
| Fish Portions | 846,182 | 370,900 |

Anderson and Susnjar, for instance, say that within a very short period of time, the present fish market won't be recognized. "We'll be integrated vertically and horizontally, and we won't just have Dan Rather selling fish anymore," Anderson says. He explains that the best promotional efforts for the fish industry thus far have been national newscasts (see insert story, *What The Scientists Say*) announcing scientific studies about the health benefits of fish.

Soon, Anderson predicts, the American consumer will be able to buy any kind of fish anytime of the year, and there will be a host of personalities selling and explaining how to buy and prepare fish.

The lure of a larger fish market is attractive to private supermarkets because their average margin is about 35 percent, compared to declining margins of under 20 percent for beef.

The military market is much different, of course, but it has two built-in advantages the supermarkets don't have: more knowledgeable fish buying patrons, and an institution that actively promotes fish for all its health benefits.

For instance, one of the problems Fred Eddowes of Pillsbury has with the civilian market is that the average consumer doesn't know much about fish. "They get flounder and sole confused, and they are not sure how to prepare it," he says. "The military," he says, "know fish and are receptive to new ideas."

Just *how* receptive is something Vaughan Clark, Director of Military Sales for Galletti Brothers Foods in Los Angeles, explains: "the military are more sophisticated. They have traveled all over, and have seen and tasted various types of fish." Galletti's sales to the military prove the point: Milk fish from the Philippines, White Sardines from Portugal, Roughy from New Zealand, Timpura, an Oriental seafood dish, and various forms of surimi—a sophisticated menu if there ever was one. Clark says Galletti's sales to west coast commissaries are headed nicely in an upward direction. "Everyone wants our in-store demos," he says.

## New Fish Sections

If there's a love affair on the west coast with fish, there's a romance budding on the east. Chet Boutelle, Chief of the headquarters Merchandising and Marketing Branch of the U.S. Army Troop Support Agency (TSA), states that new fresh fish sections are being rapidly introduced into the Army's commissaries. Already there are nine in TSA's Southeast Region, twelve that are "up and running" in the Northeast Region, and, in the Midwest, traditionally a poor market for fresh fish, TSA has two. "We in the military," Boutelle says, "are in tune with light, lean meals."

Air Force commissaries haven't noticed any appreciable shift in demand for fish, says Mike Domitrovich, Jr., headquarters Meat Merchandising Specialist at the Air Force Commissary Service. According to Domitrovich, AFCOMS has a watchful eye on a new fresh fish section in the Randolph AFB commissary in San Antonio, Texas.

Over on the Navy side, it's better. Although he has no official statistics, Clyde Chafin, Meat Department Specialist at Navy's Norfolk Commissary Division, says that "we're selling more fish than ever before. We use all we can get." It's not unusual, he says, for the Navy's area commissaries with fresh fish sections to sell 1,000 pounds of fresh fish a day.

### What The Scientists Say About Fish

The *New England Journal of Medicine* is perhaps the most widely read medical publication by the news media. On May 9, 1985, the results of three major studies on the health benefits of fish were released.

The net result was massive news coverage: morning, prime time, late evening television shows, and page one in newspapers across the country.

Below is an abstract from one of the studies:

**THE INVERSE RELATION BETWEEN FISH CONSUMPTION AND 20-YEAR MORTALITY FROM CORONARY HEART DISEASE**

Dan Kromhout, Ph.D., M.P.H., Edward B. Bosschieter, M.D., and Cor de Lezenne Coulander, M.Sc.

Abstract: The low death rate from coronary heart disease among the Greenland Eskimos has been ascribed to their high fish consumption. We therefore decided to investigate the relation between fish consumption and coronary heart disease in a group of men in the town of Zutphen, the Netherlands. Information about the fish consumption of 852 middle-aged men without coronary heart disease was collected in 1960 by a careful dietary history obtained from the participants and their wives. During 20 years of follow-up 78 men died from coronary heart disease. An inverse dose-response relation was observed between fish consumption in 1960 and death from coronary heart disease during 20 years of follow-up. This relation persisted after multiple logistic-regression analyses. Mortality from coronary heart disease was more than 50 percent lower among those who consumed at least 30 grams of fish per day than among those who did not eat fish.

We conclude that the consumption of as little as one or two fish dishes per week may be of preventive value in relation to coronary heart disease. (N Engl J Med 1985; 312:1205-9.)

Certainly helping to motivate the excellent reception given fish vendors are the government's institutional purchases for troop mess halls and other military and civil agency activities. Sal Camilari, Fish Procurement Officer in the Contracting and Production Division at the Defense Personnel Support Center's Philadelphia, PA, headquarters, states flatly that the Center is actively pushing fish. "It's the most important form of protein we can get," Camilari claims.

According to the DPSC's Army Major Joseph DeLuca, Chief of the Meat and Seafoods Branch, the Center's present purchases are 5 to 6 percent over the $30 million worth of seafood bought in 1984. (See table for a breakdown of purchases by category.)

The fish program, Major DeLuca says, has been a great success. "We have many new supplements coming in, and we are aggressively seeking new suppliers."

Still, for all the enthusiasm and excellent reception, practical problems remain. To a man, fish vendors complain about old-style commissaries that have sharp limitations in the frozen areas reserved for meat and fish. "Right now we can get only three to four items in a store, and we should be able to get at least seven," says Pillsbury's Fred Eddowes.

On the military side, the biggest problem appears to be in educating the new military consumers who haven't had the opportunity to travel and experience new fish offerings. The Navy's Clyde Chafin says that putting recipes on the labels has been a good merchandising tactic. But he and his colleagues at the other services look for more information programs and better displays. "We need a good educational program to reach our younger people," states the Army's Chet Boutelle.

If all goes as well as fish industry experts predict, the military will have that and more. All accompanied by the glitter of television and entertainment stars galore giving educational lessons.

And that's no fish story. ■

## A

### AGS FOODS, INC.
P.O. Box 87
Calimesa, CA 92320
(714) 795-4061

***Key Contacts:***
Pat Amistadi, President; Martha Amistadi, Treasurer; Wendell Duke, Vice President; Roy Simpson, Vice President

***Special Services/Capabilities:***
specialists in delicatessen programs offering all aspects of management personnel and the know-how to run a full-service delicatessen

### AMERICAN PACIFIC TRANSPORT COMPANY
2636 Waiwai Loop
Honolulu, HI 96819
(808) 836-1151

***Key Contacts:***
Robert E. Lewis, President; Craig P. Findeisen, Marketing Representative; Harry K. Yamada, Operations Manager; Miriam S. Zakahi, Vice President

### ARK FOOD DISTRIBUTORS
2602 Durango Drive
Colorado Springs, CO 80910
(303) 687-9358

***Key Contact:***
James Watson, President

***Products Distributed:***
beverages, dry grocery

### ART DYKSTRA SALES, INC.
5575 Logan
Denver, CO 80216
(303) 296-8542

***Key Contacts:***
Ron Waits, Vice President & Sales Manager—Refrigerated; Ole Olson, Sales Manager—Dry Grocery; Art Dykstra, President

***Ownership:***
corporation

***Established:***
1965

***Products Distributed:***
dry grocery, health & dietetic, packaged meat & cheese, bulk deli meat & cheese

***Warehouse Profile:***
5,000 sq. ft. (dry grocery)
15,000 sq. ft. (frozen/chill)

***Other Than Military Accounts:***
retail grocery, food service

***1982 Military Sales:***
$2,700,000

***Number Of Principals Represented:***
85

***Military Customers:***
commissaries, troop subsistence activities

***Military Locations Served:***
USAF Academy, F.E. Warren AFB, Peterson Field, Lowry AFB, Ellsworth AFB, Ft. Carson, Fitzsimmons AMC Hospital

***Capabilities/Special Services:***
shelf stocking, store reset assistance, operation of complete deli in commissaries

### ASSOCIATED GROCERS OF COLORADO
P.O. Box 5528 T.A.
Denver, CO 80217
(303) 367-7000

***Key Contacts:***
Wendell Pascoe, Director–Intransit Merchandise; Vern Nelms, Military Sales Manager–Denver; Dale Lowe, Military Sales Manager–Albuquerque

***Branch Office:***
Albuquerque, NM
(505) 345-1856

***Ownership:***
co-op

***Established:***
1935

***Products Distributed:***
dry grocery, frozen, produce, meat, HABA and non-foods

***Warehouse Profile:***
385,000 sq. ft. (dry grocery)
188,000 sq. ft. (frozen/chill)
120,000 sq. ft. (HABA/non-food)

***Other Than Military Accounts:***
retail supermarkets

***Military Customers:***
commissaries, exchanges, troop subsistence activities

***Military Locations Served:***
Ft. Carson, CO; Fitzsimmons AMC Hospital, CO; Peterson AFB, CO; Lowry AFB, CO; F.E. Warren AFB, WY; Cannon AFB, NM; Kirtland AFB, NM; Holloman AFB, NM; White Sands Proving Grounds, NM; Reese AFB, TX; and Ft. Bliss, TX

## B

### PAUL BAKER, INC.
8633 Lee Highway
Fairfax, VA 22031
(703) 560-1687

***Key Contacts:***
Alfred M. Palmer, President; Iver J. Olsen, Executive Vice President; William Wolfe, Vice President

***Ownership:***
close corporation

***Established:***
1953

***Products Distributed:***
snack foods

***Warehouse Profile:***
8,000 sq. ft. (dry grocery)

***Other Than Military Accounts:***
retail restaurants

***Military Customers:***
commissaries

***Military Locations Served:***
Washington, D.C. metropolitan area

***Capabilities/Special Services:***
shelf stocking

### B. GREEN & COMPANY, INC.
3601 Washington Boulevard
Baltimore, MD 21227
(301) 247-8300

***Key Contacts:***
Bernard Green, President; Hannah Green, Military Liaison; Walter Wolfel, Director—Military Sales; David Green, Vice President—Military

***Branch Offices:***
Dunn, NC
(919) 892-1164

Norfolk, VA
(804) 853-0833

Orlando, FL
(305) 859-2481

***Ownership:***
private corporation

***Established:***
1915

***Products Distributed:***
dry grocery, chill, frozen foods, dairies, meats, deli bake off, ice cream

***Warehouse Profile:***
700,000 sq. ft. (dry grocery)
125,000 sq. ft. (perishables)

***Other Than Military Accounts:***
retail grocery

***Number Of Principals Represented:***
145

***Military Customers:***
commissaries, exchanges, ships afloat

***Military Locations Served:***
all military installations from Long Island, NY, to Key West, FL, inclusive of AL, on a once a week delivery schedule

***Capabilities/Special Services:***
shelf stocking, MSI ordering available, source loading, export labeling, documentation capabilities

***Reports Available To Principals:***
monthly movement reports by base, by vendor and by item; service level reports

***Further Information:***
complete brochure available upon request

**BERLINER FOODS CORPORATION, INC.**
7820 Cessna Avenue
Gaithersburg, MD 20879
(301) 258-0600

***Key Contacts:***
Jim Moran, Mitch Berliner

***Products Distributed:***
frozen

***Military Locations Served:***
Mid-Atlantic Region

**BLUEBIRD DISTRIBUTING COMPANY**
1554-A Juliesse Avenue
Sacramento, CA 95813
(916) 920-4643

***Key Contacts:***
Gordon "Rex" Rechcygl, Military Sales Manager; William E. DeFord, Owner

***Ownership:***
private

***Established:***
1971

***Products Distributed:***
dry grocery

***Warehouse Profile:***
14,500 sq. ft. (dry grocery)

***Other Than Military Accounts:***
retail grocery, retail liquor stores

***Number Of Principals Represented:***
10

***Military Customers:***
commissaries

***Military Locations Served:***
Central Valley and Northern California

***Capabilities/Special Services:***
limited service distributing to include shelf stocking and display building

***Reports Available To Principals:***
promotion impact reports, annual recap reports

***Further Information:***
brochure describing services available upon request

**BOUDREAUX DISTRIBUTING COMPANY**
220 North 47th Avenue
Phoenix, AZ 85043
(602) 269-5786

***Key Contacts:***
Pat Boudreaux, Owner and President; Donna Boudreaux, Vice-President; Mary Ann McLaughlin, Office Manager

***Ownership:***
private

***Established:***
1976

***Products Distributed:***
dry grocery, chill, frozen

***Warehouse Profile:***
20,000 sq. ft. (dry grocery)
2,600 sq. ft. (chill)
6,400 sq. ft. (frozen)

***Other Than Military Accounts:***
none

***Number Of Principals Represented:***
73 (plus BPAs)

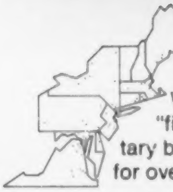
***Military Customers:***
commissaries, exchanges, troop subsistence activities

***Military Locations Served:***
AFCOMS Southwest Complex (to include Luke AFB, AZ; Williams AFB, AZ; Davis-Monthan AFB, AZ); ARMY (TSA): Ft. Huachuca, AZ; Yuma Proving Grounds, AZ; MARINES: MCAS Yuma, AZ

***Capabilities/Special Services:***
shelf stocking, display building, store reset assistance and flexible delivery programs tailored to meet the unique needs of military commissaries

HOW DOES THE MILITARY RATE S. PRAWER & COMPANY?

"★★★★★"



No supplier gets a higher rating from the military than we do. And no wonder. We've been providing reliable "five star" delivery to 55 military bases from Maine to Virginia for over 25 years.

Computerized, specialized, experienced. That's S. Prawer & Co.

Call Lou Janson or Gilbert Prawer today. We're committed. And we're ready to take command. On the East Coast, to Panama or overseas.

S. Prawer & co.
*Dry groceries • refrigerated goods • dairy • meats • deli items • chilled • beverages • health & beauty aids*
P.O. Box 1400 150 Read St., Portland, ME 04104
(207)775-0223 1-800/445-6900

"★★★★★"

***Further Information:***
brochures available upon request

### BURKE DISTRIBUTING CO., INC.

P.O. Box 98748
Tacoma, WA 98498
(206) 922-2992

***Key Contacts:***
Kelly Burke, President; Kevin Burke, Vice President

***Ownership:***
close corporation

***Established:***
1981

***Warehouse Profile:***
15,000 sq. ft. (dry grocery)
5,000 sq. ft. (frozen/chill)

***Other Than Military Accounts:***
none

***Number Of Principals Represented:***
50

***Military Customers:***
commissaries, exchanges

***Military Locations Served:***
Pacific Northwest & Alaska; McChord AFB; Fairchild AFB; Malmstrom AFB; Mt. Home AFB; Hill AFB; Ft. Lewis; Dugway Proving Grounds; Sandpoint NAS; GSA–Auburn; Bremerton NSY; Bangor NSB; Whidbey Island NAS; Elmendorf AFB; Eielson AFB; Ft. Richardson; Ft. Wainwright; Ft. Greeley

***Capabilities/Special Services:***
shelf stocking, order writing

***Reports Available To Principals:***
monthly inventory activity reports, service level reports, any requested sales and placement information

***Further Information:***
brochure available upon request

## C

### C & S WHOLESALE GROCERS, INC.

Ferry Road
Brattleboro, VT 05031
(802) 257-4371

***Toll Free Telephone:***
(800) 451-4195

***Key Contacts:***
Lester Cohen, President; Kathey Halvey, Military Coordinator; Deborah Reffi, Customer Service

***Ownership:***
close corporation

***Established:***
1918

***Products Distributed:***
dry grocery, chill, frozen, candy, tobacco, meat, HABA, store supplies

***Warehouse Profile:***
240,000 sq. ft. (dry grocery)
61,000 sq. ft. (frozen/chill)

***Other Than Military Accounts:***
retail grocery

***1983 Military Sales:***
$7,300,000

***Number Of Principals Represented:***
70

***Military Customers:***
commisaries, exchanges, troop subsistence activities

***Military Locations Served:***
CONNECTICUT: New London NSB; MAINE: Bangor IA; Brunswick NAS; Loring AFB; MASSACHUSETTS: Ft. Devens, Hanscom AFB; Otis NAFA, Westover; NEW HAMPSHIRE: Pease AFB; NEW YORK: Ft. Drum; Griffiss AFB; Plattsburgh AFB; Scotia NAU; Seneca Depot; Stewart Airfield; USMA West Point; RHODE ISLAND: Davisville Exchange; Newport NETC

***Capabilities/Special Services:***
excellent communication with manufacturers, brokers and the military to assure complete and on-time deliveries, supported by shelf stocking, store reset assistance, export/source load/documentation capabilities

***Reports Available To Principals:***
computerized reports as needed

***Further Information:***
brochures available upon request

### CALIFORNIA & WASHINGTON COMPANY

1575 Old Bayshore Highway
Burlingame, CA 94010
(415) 692-4520

***Key Contacts:***
Hermann J. Lehmann, Military Sales Manager

***Products Distributed:***
distributors of C & W frozen products

### CALIFORNIA MILITARY DISTRIBUTORS, INC.

2929 Kansas Avenue
Riverside, CA 92507
(714) 781-1090

***Key Contacts:***
W.I. "Bill" Pope, President; L.B. "Larry" Chodzinski, Operations Manager

***Ownership:***
close corporation

***Established:***
1983

***Products Distributed:***
dry grocery, chill, frozen

***Warehouse Profile:***
38,000 sq. ft. (dry grocery)
33,000 cubic ft. (frozen/chill)

***Number Of Principals Represented:***
46

***Military Customers:***
commissaries, exchanges, troop subsistence activities

***Military Locations Served:***
AIR FORCE: Cal-Nev Complex; NAVY: Commissary Store Region San Diego; MARINES: West Coast Commissary Complex (except Yuma, AZ); ARMY: Ft. Irwin; also Navy, Marine, and AAFES exchanges

***Capabilities/Special Services:***
shelf stocking, display building, store reset assistance, export/source load/documentation, night deliveries

***Reports Available To Principals:***
weekly activity, monthly summary, distribution byline item/by store, quarterly, semi-annual, recap and inventories

***Further Information:***
brochures available upon request

### CALIFORNIA PACIFIC ASSOCIATES

2131 19th Avenue
P.O. Box 16901
San Francisco, CA 94116
(415) 665-2650

***Key Contacts:***
Jack F. Pearse, Owner; Anna Toy, Director of Logistics

***Branch Offices:***
GUAM
(contact: James Cooper)
Tel.: 671-632-7211

HONOLULU, HI
(contact: M.A. Johnson)
(808) 373-4533

IWAKUNI, Japan
(contact: Larry Jones)
Tel.: 81-82-731-8952

OKINAWA, Japan
(contact: Regis Weingartner)
Tel.: 81-98-939-2479

YOKOHAMA, Japan
(contact: Bill Fox)
Tel.: 81-45-622-2009

PHILIPPINES
(contact: Don Abello)
Tel.: Cavite City 44050

***Ownership:***
private

***Established:***
1951

***Products Distributed:***
frozen meats, fish, poultry and assorted frozen food items; all types of chilled beef, cheeses, deli items, produce

***Warehouse Profile:***
12,000 sq. ft. (frozen/chill)

***Other Than Military Accounts:***
retail grocery, restaurants, hospitals, hotels, airlines, caterers, wholesale, institutional, retail supermarkets

***1984 Military Sales:***
$14,000,000

***Number Of Principals Represented:***
2 (plus additional 65 product lines handled as a principal; products listed with DPSC may be found under Supply Bulletin No. 600-038)

***Military Customers:***
commissaries, clubs, Navy food service/snack bars

***Military Locations Served:***
complete Pacific basin

***Capabilities/Special Services:***
unique combination of logistics with sales representation; services include source load and documentation, palletizing for export, in-store demonstrations, shelf stocking, sales and service representation

***Further Information:***
free brochure describing specific capabilities available upon request

**C.B. RAGLAND COMPANY**
2720 Eugenia Avenue
P.O. Box 40587
Nashville, TN 37204
(615) 259-4622

***Toll Free Telephone:***
(800) 251-3020 (from TN)
(800) 251-9495 (from KY)

***Key Contact:***
Peter Kahne, Director of Purchasing

***Ownership:***
private

***Established:***
1926

***Products Distributed:***
dry grocery, chill, frozen, HABA

***Warehouse Profile:***
210,000 sq. ft. (dry grocery)
60,000 sq. ft. (frozen/chill)

***Other Than Military Accounts:***
retail grocery

***1982 Military Sales:***
$10,000,000

***Number Of Principals Represented:***
55

***Military Customers:***
commissaries

***Military Locations Served:***
Ft. Campbell; Ft. Knox; Arnold AFB; Redstone Arsenal

***Capabilities/Special Services:***
multi-weekly deliveries

***Reports Available To Principals:***
computerized invoices upon request

**C. FÖRSTER GmbH**
P.O. Box 1451
6450 Hanau 1
West Germany
(06181) 81048 (6 lines)

***Key Contacts:***
C. Förster, President; J.H. Huehn, Director-General/Manager; F. Heintz, Sales Manager

***Ownership:***
corporation

***Established:***
1971

***Products Distributed:***
consumer audio/video, electronic and photographic products

***Warehouse Profile:***
17,000 sq. ft.

***1984 Military Sales:***
over $28 million

***Number Of Principals Represented:***
9

***Military Customers:***
AAFES-Europe exchanges; Navy exchanges in Europe; US Audio/Photo Clubs in Europe; other NATO forces stationed in Germany

***Military Locations Served:***
Germany; England; Belgium; Holland; Iceland; Italy; Greece; Turkey; Spain

***Capabilities/Special Services:***
warehousing (bonded warehouse), distribution with own carriers, extensive technical service (warranty repair services: Audio-TV-Video-Photo), training facilities, extensive international sales network

**CHADWICK DISTRIBUTING, INC.**
4930-B Jefferson NE
Albuquerque, NM 87109
(505) 884-2025

***Key Contact:***
Bill S. Chadwick, President

***Ownership:***
corporation

***Established:***
1983

***Products Distributed:***
dry grocery, chill, frozen

***Number Of Principals Represented:***
15

***Military Customers:***
commissaries

***Military Locations Served:***
New Mexico and Texas including: Kirtland AFB, Holloman AFB, Cannon AFB, White Sands Missile Range, Ft. Bliss, Reese AFB

**CHALMERS DISTRIBUTORS, INC.**
9300 E. Billy The Kid Street
El Paso, TX 79907
(915) 858-1053

***Key Contact:***
Darrell Chalmers, President

***Ownership:***
corporation

***Established:***
1980

***Products Distributed:***
dry grocery, chill, frozen

***Warehouse Profile:***
27,500 sq. ft. (dry grocery)
2,500 sq. ft. (frozen/chill)

***Other Than Military Accounts:***
none

**CORE-MARK DISTRIBUTORS, INC.**
353 Meyer Circle
Corona, CA 91720
(714) 736-1591

***Key Contacts:***
Gordon Cramer, Account Executive—Military Contracts; Ron Kentish, Commodity Manager; Bob Umphress, Manager—Corporate Accounts

***Ownership:***
division of Core-Mark International

***Established:***
previously Glaser Brothers
established 1888

***Products Distributed:***
cigarettes, tobacco, cigars, candy, grocery, HABAs, sundries, frozen foods, fast foods

***Warehouse Profile:***
105,000 sq. ft. (dry grocery)
850 sq. ft. (frozen chill)

***Other Than Military Sales:***
retail grocery, sub jobbers, cash & carries, hotels, gift shops, airports, hospitals

***1983 Military Sales:***
$8,743,000

***Number Of Principals Represented:***
1,134

***Military Customers:***
commissaries, exchanges, clubs, VA canteens, troop subsistence activities, food service/snack bars, ships' stores

***Military Locations Served:***
California, Oregon, Washington, Nevada, Utah, Idaho, Arizona

***Capabilities/Special Services:***
shelf stocking, display building, store reset assistance, export/source load/documentation capabilities

***Further Information:***
available upon request

**CRESSEY DOCKHAM & COMPANY, INC.**
1 Parade Place
Andover, MA 01810
(617) 662-6800

***Key Contacts:***
Sam Perruccio, Director—Sales & Marketing; Jim Oppenheim, President; Arthur Ansin, Executive Vice President; John DiBlasi, Inside Sales

***Ownership:***
close corporation

***Established:***
1908

***Products Distributed:***
dry grocery, chill, dairy, frozen/packaged meat, general merchandise

***Warehouse Profile:***
36,000 sq. ft. (concourse)
40,000 sq. ft. (holding area)
280,000 sq. ft. (dry grocery)
60,000 sq. ft. (frozen)
12,000 sq. ft. (candy)
62,000 sq. ft. (office/administration)

***Other Than Military Accounts:***
retail grocers, warehouse stores

***Military Customers:***
commissaries & exchanges

***Military Locations Served:***
all of New England and upstate New York

***Capabilities/Special Services:***
shelf stocking, store set up and reset, frequent delivery, packaging and supplies, scanning assistance, direct store delivery programs

***Reports Available To Principals:***
movement recap by item, by base, by vendor; service level report

## D

### D & H DISTRIBUTING, INC.

106 McNeil Street
Shreveport, LA 71101
(318) 222-3083

***Key Contacts:***
Bill Griffin, President; Ruth Griffin, Secretary/Treasurer

***Ownership:***
corporation

***Established:***
1979

***Products Distributed:***
dry grocery

***Warehouse Profile:***
20,000 sq. ft. (dry grocery)

***1983 Military Sales:***
$5,000,000

***Number Of Principals Represented:***
65

***Military Customers:***
commissaries & exchanges

***Military Locations Served:***
AFCOMS (Delta Complex): Barksdale AFB; England AFB; Little Rock AFB; Blytheville AFB; ARMY: Ft. Polk; NAVY: Memphis NAS

***Capabilities/Special Services:***
store reset assistance

***Reports Available To Principals:***
inventory control reports, activity reports

***Further Information:***
more information can be furnished as requested

## F

### FEDERATED MILITARY SALES CORPORATION

3025 W. Salt Creek Lane
Arlington Heights, IL 60005
(312) 577-1200

***Toll Free Telephone:***
(800) 323-6346

***Key Contacts:***
Michael C. Fuller, Senior Vice President—Sales; Charlie Palmgren, National Sales Director; Raymond Hafertepe, Accounting Officer

***Branch Offices:***
Exeter, NH
(603) 778-8504

Dallas, TX
(214) 387-1900

Atlanta, GA
(404) 448-0456

Sunnyvale, CA
(408) 737-1000

***Ownership:***
private

***Established:***
1920

***Products Distributed:***
dry grocery, chill, frozen, HABA

***Other Than Military Accounts:***
retail grocery, food service

***Number Of Principals Served:***
1700

***Military Locations Served:***
coast to coast

***Reports Available To Principals:***
monthly case and dollar sales reports

### FLASH STEAK COMPANY, INC.

7959 Paramount Boulevard
Pico Rivera, CA 90660
(213) 949-2558

***Key Contact:***
Chris Sanchez

***Products Distributed:***
frozen, dry

***Military Customers:***
commissaries, exchanges

***Military Locations Served:***
Southern California

### FLEMING COMPANIES, INC.

6301 Waterford Boulevard
(street zip: 73118)
Box 26647
Oklahoma City, OK 73126
(405) 841-8458

***Key Contacts:***
Bob Pitts, Senior Vice President—Procurement & Merchandising; Bob Shields, Manager—Military Sales (Fremont, CA); Joe Ratcliff, Manager of Merchandising (San Antonio, TX)

***Branch Offices:***
Fremont, CA
(415) 657-8900

San Antonio, TX
(512) 661-4561

***Ownership:***
corporation

***Established:***
1930

***Products Distributed:***
dry grocery, chill, frozen

***Warehouse Profile:***
Fremont, CA
575,000 sq. ft. (dry grocery)
60,000 sq. ft. (frozen/chill)

San Antonio, TX
325,000 sq. ft. (dry grocery)
30,000 sq. ft. (frozen/chill)

***Number Of Principals Represented:***
75

***Military Customers:***
commissaries and exchanges

***Military Locations Served:***
complete markets in relation to branch offices' distribution areas

***Capabilities/Special Services:***
varies by distribution office; further details available upon request

***Reports Available To Principals:***
movement reports and dead stock reports as required

***Other Than Military Accounts:***
retail grocery

***Further Information:***
brochures available upon request

### FOOD SERVICE COMPANY

P.O. Box 4644
Pensacola, FL 32507
(904) 455-4360

***Key Contacts:***
Jim Evans, President; Ron Coggin, Business Manager; Jerry Thomas, Sales Supervisor; Allen Evans, Secretary-Treasurer

***Ownership:***
close corporation

***Established:***
1945

***Products Distributed:***
dry grocery, chill, frozen

***Warehouse Profile:***
20,000 sq. ft. (dry grocery)
6,000 sq. ft. (frozen/chill)

***Other Than Military Accounts:***
none

***1982 Military Sales:***
$5 million

***Number Of Principals Represented:***
30

***Military Customers:***
commissaries, exchanges

***Military Locations Served:***
AFCOMS Gulf Area Complex (Maxwell AFB); NAVRESSO Pensacola Region (Pensacola, FL)

***Capabilities/Special Services:***
store reset assistance, export (Pensacola port), source load/documentation

***Reports Available To Principals:***
monthly movement by vendor by store; monthly inventory reports

***Further Information:***
brochures available upon request

**FRONT RANGE DISTRIBUTORS, INC.**
735 Valley Street
Colorado Springs, CO 80915
(303) 574-2823

***Key Contacts:***
Rich Laraia, Vice President; Ethan Hokit, President

***Ownership:***
close corporation

***Established:***
1981

***Products Distributed:***
dry grocery, chill, frozen

***Warehouse Profile:***
11,000 sq. ft. (dry grocery)
4,000 sq. ft. (frozen/chill)

***Other Than Military Accounts:***
none

***Number Of Principals Represented:***
35

***Military Customers:***
commissaries

***Military Locations Served:***
AFCOMS Rocky Mountain Complex and TSA Midwest Region commissaries in Colorado and Wyoming

***Capabilities/Special Services:***
shelf stocking (of frequently delivered items), working with brokers to plan programs, assistance with display building, monitoring of competitive activities

***Reports Available To Principals:***
monthly case and dollar figures, year-to-date case and dollar figures

***Further Information:***
call or write for specific information

# G

**GOLDEN FOOD PRODUCTS**
1031 44th Street
Newport News, VA 23647
(804) 244-0131

***Key Contact:***
Buddy Holzsweig, Vice President–Sales

***Branch Office:***
Richmond, VA
(804) 748-6394

***Ownership:***
private

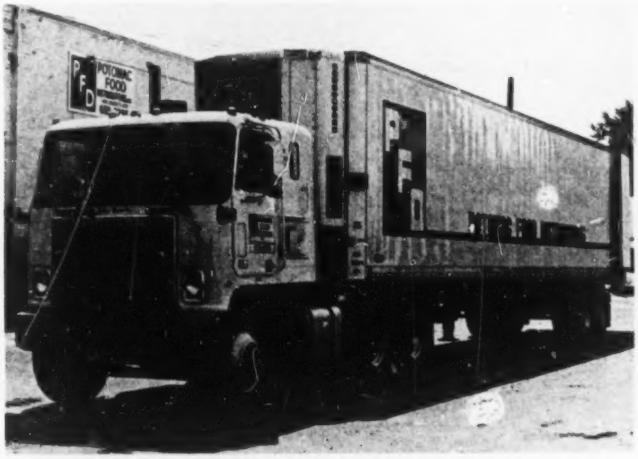
***Established:***
1950

***Products Distributed:***
dry grocery

***Warehouse Profile:***
31,000 sq. ft. (dry grocery)

***Other Than Military Accounts:***
retail grocery

***Number Of Principals Represented:***
1 (plus BPA contracts)



**Potomac Food Distributors**

6021 Farrington Ave.
Alexandria, Virginia
22301
Telephone:
703-823-0400

G. (Wally) Cook, President

***Quality service to our one and only customer-the military commissary***

Serving Washington, D.C., Virginia, Maryland, Delaware, New Jersey and Pennsylvania

P F D

**Military Customers:**
commissaries

**Military Locations Served:**
AIR FORCE: Langley AFB; ARMY: Ft. Eustis; Ft. Monroe; Ft. Story; NAVY: FSO Norfolk (all stores)

**Capabilities/Special Services:**
store door delivery

**GOYA de PUERTO RICO, INC.**
P.O. Box 1467
Bayamon, Puerto Rico 00619
(809) 786-4900

**Key Contacts:**
Frank Unanue, President; Robert Unanue, General Manager; Joseph Unanue, Jr., Marketing Director; Remigio Nieves, Assistant General Manager

**Branch Offices:**
Goya Foods/NJ
(201) 348-4900

Diana Foods/Miami, FL
(305) 592-3150

**Ownership:**
private

**Established:**
1936

**Products Distributed:**
dry grocery

**Warehouse Profile:**
250,000 sq. ft. (dry grocery)

**Other Than Military Accounts:**
retail grocery

**Number Of Principals Represented:**
60

**Military Customers:**
commissaries

**Military Locations Served:**
U.S., Central America, Overseas

**Capabilities/Special Services:**
provide full marketing assistance: shelf stocking, displays, assistance to develop better sales and service

**Further Information:**
free brochures and cook books available upon request

**GREEN SPOT (MIDDLE EAST) LTD.**
1300 Dove St. Suite 100
Newport Beach, CA 92660
(714) 476-2210

**Key Contact:**
Edward Babic, Chairman

**Products Distributed:**
beverages

**Military Customers:**
commissaries, exchanges

**Military Locations Served:**
worldwide

# H

**H & H FOODS, INC.**
P.O. Box 5561
Shreveport, LA 71105
(318) 221-8861

**Key Contacts:**
Don Horn, Owner; Walter Mercik, Sales Manager

**Military Customers:**
commissaries & exchanges

**Capabilities/Special Services:**
distributors of dry groceries, chilled and frozen foods to military commissaries and exchanges

To the best sellers. From the best sellers.

5 FINE CIGARS
Dutch Masters
CIGARS
EL Producto
Cigars
FIVE CIGARS
MURIEL CIGARS

Consolidated Cigar Corporation

### HAMBERGER ENTERPRISES, INC.

7204 Wimsatt Road
P.O. Box 743
Springfield, VA 22150
(703) 941-8818

***Key Contacts:***
Arnold J. Hamberger, Jr., Chairman of the Board; Steven C. Hamberger, President; Lucille H. Owens, Secretary-Treasurer

***Ownership:***
corporation

***Established:***
1973

***Products Distributed:***
dry grocery

***Warehouse Profile:***
40,000 sq. ft. (dry grocery)

***Other Than Military Accounts:***
none

***Military Customers:***
commissaries, exchanges, clubs, VA canteens, troop subsistence activities, food service/snack bars, ships stores

***Military Locations Served:***
commissaries in seven state area of Virginia, Maryland, Washington, D.C., Delaware, New Jersey, New York & Pennsylvania

***Reports Available To Principals:***
monthly movement reports to principals only

### HAWAII MEAT COMPANY, LTD.

711 Middle Street
(Street Zip: 96819)
P.O. Box 3259
Honolulu, HI 96801
(808) 845-2941

***Key Contacts:***
Ronald Rea, President; Leslie Wannall, Sales Manager; Joe Steeholm, Plant Superintendent

***Ownership:***
corporation

***Established:***
1909

***Products Distributed:***
frozen and/or chill

***Other Than Military Accounts:***
retail grocery, restaurants, schools

***1983 Military Sales:***
$5,104,091

***Military Customers:***
commissaries, exchanges, clubs, ships stores, snack bars

***Military Locations Served:***
Hickam, Schofield Barracks, Pearl Harbor, Barbers Point, Kaneohe Bay, club system

***Capabilities/Special Services:***
shelf stocking, plant tours

### HERBERT HALPERIN DISTRIBUTING CORPORATION

4801 Forbes Boulevard
Lanham, MD 20706
(301) 731-5600

***Toll Free Telephone:***
(800) 492-8001 (Incoming MD)
(800) 638-0236 (Incoming NJ, VA, WVA, PA, DE)

***Key Contacts:***
John Loveys, Vice President—Sales; Izzy Peltin, Military Sales Manager; LeRoy Bagley, Director—Retail Sales

***Ownership:***
private

***Established:***
1963

***Products Distributed:***
refrigerated dairy-deli products, dry grocery, frozen

***Warehouse Profile:***
20,000 sq. ft. (dry grocery)
50,000 sq. ft. (frozen/chill)

***Other Than Military Accounts:***
retail grocery, caterers, universities, restaurants

***Number Of Principals Represented:***
57

***Military Locations Served:***
metropolitan Washington, D.C., and Richmond, VA

***Capabilities/Special Services:***
shelf stocking of all authorized commissary products, in-store displays, store reset assistance

### HOERTER PROVISION CO., INC.

P.O. Box 37—Fow Avenue
Swedesboro, NJ 08085
(609) 467-3232

***Key Contacts:***
Ronald B. Hoerter, Vice President; William B. Hoerter, President

***Ownership:***
close corporation

***Established:***
1968

***Products Distributed:***
dry grocery, chill, frozen

***Warehouse Profile:***
10,000 sq. ft. (dry grocery)
50,000 sq. ft. (frozen/chill)

***Other Than Military Accounts:***
none

***1982 Military Sales:***
$9 million

***Number of Principals Represented:***
65 (plus BPAs)

***Military Customers:***
commissaries, exchanges, clubs, troop subsistence activities, food service/snack bars

***Military Locations Served:***
five-state area of New York, Pennsylvania, New Jersey, Delaware and Maryland

***Capabilities/Special Services:***
shelf stocking, store reset assistance, export, public storage (for dry grocery, chill & frozen products)

***Further Information:***
brochures available upon request

## J

### JILLSON DISTRIBUTORS, INC.

8221 Arjons Drive
Suite A
San Diego, CA 92126
(619) 566-8000

***Key Contacts:***
Jim Jillson, President; Gil Davis, Director of Marketing

***Ownership:***
corporation

***Established:***
1947

***Products Distributed:***
dry grocery, chill, frozen

***Warehouse Profile:***
15,000 sq. ft. (dry grocery)
10,000 sq. ft. (frozen/chill)

***Other Than Military Accounts:***
none

***Number Of Principals Represented:***
65

***Military Customers:***
commissaries, exchanges

***Military Locations Served:***
Southern California; Las Vegas, NV

***Reports Available To Principals:***
monthly sales by store, by item

### JOHNSON BROTHERS DISTRIBUTORS, INC.

66 Bonaventura Dr.
San Jose, CA 95134
(408) 263-4417

***Key Contacts:***
Marvin Johnson, President; Ole Johnson, Manager

***Ownership:***
close corporation

***Established:***
1951

***Products Distributed:***
dry grocery, chill

***Warehouse Profile:***
3,000 sq. ft. (dry grocery)
2,500 sq. ft. (chill)

***Other Than Military Accounts:***
institutional

***1982 Military Sales:***
$1,500,000

***Number Of Principals Represented:***
50

***Military Customers:***
commissaries, exchanges

***Military Locations Served:***
NAVY: FSO Oakland (all stores); ARMY: Presidio of San Francisco, Oakland Army Base

***Capabilities/Special Services:***
shelf stocking, display building, store reset assistance

# L

### ALFRED M. LEWIS, INC.

3021 Franklin Avenue
Riverside, CA 92520
(714) 684-0170

***Key Contacts:***
Sandy Hanson, Director of Marketing—Military Installations; Joe Allen, Military Marketing Specialist

***Branch Offices:***
Las Vegas, NV
(702) 736-3574

Phoenix, AZ
(602) 269-9771

Northridge, CA
(818) 349-6600

San Diego, CA
(619) 477-3161

***Ownership:***
close corporation

***Established:***
1905

***Products Distributed:***
dry grocery, chill, frozen, HABA

***Warehouse Profile:***
Riverside Division:
354,500 sq. ft. (dry grocery)
42,500 sq. ft. (refrigerated)

San Diego Division:
193,324 sq. ft. (dry grocery)
26,799 sq. ft. (refrigerated)

Phoenix Division:
316,324 sq. ft. (dry grocery)
59,500 sq. ft. (refrigerated)

Northridge Division:
248,756 sq. ft. (dry grocery)
22,500 sq. ft. (refrigerated)

Las Vegas Division:
151,476 sq. ft. (dry grocery)
13,200 sq. ft. (refrigerated)

***Other Than Military Accounts:***
retail grocery, restaurants, schools, hospitals, state and county institutions

***1984 Military Sales:***
over $100 million

***Number of Principals Represented:***
130

***Military Customers:***
commissaries, exchanges, clubs, troop subsistence activities, food service/snack bars

***Military Locations Served:***
AIR FORCE: Davis-Monthan AFB, AZ; Luke AFB, AZ; Williams AFB, AZ; Nellis AFB, AZ; March AFB, CA; Norton AFB, CA; George AFB, CA; El Segundo, CA; Edwards AFB, CA; Vandenberg AFB, CA; ARMY: Fort Huachuca, AZ; Fort Irwin, CA; Yuma Proving Ground, AZ; MARINES: El Toro, CA; Barstow, CA; 29 Palms, CA; Camp Pendleton, CA; San Onofre, CA; Yuma, AZ; MCRD San Diego, CA; NAVY: NS San Diego, CA; NAS Miramar, CA; NAS North Island, CA; Long Beach, CA: Port Hueneme, CA; Point Mugu, CA; China Lake, CA

***Capabilities/Special Services:***
expert military marketing advice to manufacturers who are interested in the Southwest military market

***Reports Available To Principals:***
monthly movement reports (by base or by manufacturer)

### THE LEWIS BEAR COMPANY

P.O. Box 17209
Pensacola, FL 32522
(904) 438-9651

***Toll Free Telephone:***
(800) 874-0106

***Key Contacts:***
R. Burton Canaday, Vice President; Dan East, Director—Military Sales; R.K. Bolye, Executive Vice President

***Branch Offices:***
Columbus, GA
(404) 698-5547

Dothan, AL
(205) 793-5342

***Ownership:***
private

***Established:***
1876

***Products Distributed:***
dry grocery, chill, frozen

***Warehouse Profile:***
450,000 sq. ft. (dry grocery)
70,000 sq. ft. (frozen/chill)

***Other Than Military Accounts:***
retail grocery

***1984 Military Sales:***
$85,000,000

***Number of Principals Represented:***
220

***Military Customers:***
commissaries

***Military Locations Served:***
NAVY: Pensacola Region; AIR FORCE: Gulf Area Complex; Robbins AFB; Moody AFB; ARMY: Fort Benning; Fort Rucker; Fort McClellan; Redstone Arsenal; Fort Mcpherson; Fort Gillem; Fort Stewart; Hunter AAF; Fort Gordon; MARINES: Albany, GA; COAST GUARD: Bates Field

***Reports Available To Principals:***
movement reports

***Further Information:***
brochure available on request

### LOEB CORPORATION

P.O. Box 6236
Chesapeake, VA 23323
(804) 487-2586

***Key Contacts:***
Neil Larson, General Manager; Hank Sheffer, Sales Manager; Steve Detwiler, Buyer; Bob Lerf, Controller

***Ownership:***
corporation; wholly-owned subsidiary of Provigo, Inc.

***Established:***
1965

***Products Distributed:***
dry grocery, frozen, chill, candy, health and beauty aids

***Warehouse Profile:***
70,000 sq. ft. (dry grocery)
10,000 sq. ft. (frozen/chill)

***Other Than Military Accounts:***
retail trade (bulk promotional items)

***1984 Military Sales:***
$33,000,000

***Number of Principals Represented:***
96

***Military Customers:***
commissaries, exchanges, ships stores

***Military Locations Served:***
Southern Virginia (Richmond and south); North Carolina; overseas (via Cheatham Annex, direct)

***Capabilities/Special Services:***
offers complete professional services: electronic order entry, (daily delivery customers); shelf stocking, display building, customer service reps in the field; export containers from our warehouse

***Reports Available To Principals:***
monthly sales reports by vendor by base; monthly sales stocking reports; annual sales reports in both sales dollars and cases moved

***Further Information:***
descriptive brochure and Provigo Annual Report available upon request

# M

**MARIN PRODUCTS**
55 Frosty Lane
Ignacio, CA 94947
(415) 454-2434

***Key Contact:***
Frank Silvestri, President

**MERRITT SALES, INC.**
P.O. Box 2654
2100 South 4th
Lawton, OK 73502
(405) 357-1722

***Key Contacts:***
Matt Purvis, Sales Manager; Gene Purvis, Owner; Mark Purvis, Warehouse Manager; Susan Parkhill, Accounting

***Ownership:***
close corporation

***Established:***
1977

***Products Distributed:***
dry grocery, chill, frozen

***Warehouse Profile:***
20,000 sq. ft. (dry grocery)
15,000 sq. ft. (frozen/chill)

***1983 Military Sales:***
$7,600,000

***Number Of Principals Represented:***
65

***Military Customers:***
commissaries

***Military Locations Served:***
McConnell AFB, KS; Tinker Vance, Altus AFBs, OK; Sheppard and Carswell AFBs, TX; Ft. Sill, OK

***Capabilities/Special Services:***
shelf stocking

***Further Information:***
brochure available upon request

**MEXIM COMPANY, INC.**
340 Industrial Way
Brisbane, CA 94005
(415) 467-8750

***Key Contact:***
Eugenio Lopez, Jr., President

***Products Distributed:***
importers and exporters of Philippine food products

**MIDWEST FOOD DISTRIBUTORS, INC.**
2636 Walnut Street
Denver, CO 80205
(303) 296-1598

***Key Contacts:***
Dale M. Finley, General Manager; Donna Finley, President; Darel Keck, Vice-President

***Ownership:***
corporation

***Established:***
1977

***Products Distributed:***
dry grocery, chill, frozen

***Warehouse Profile:***
8,500 sq. ft. (dry grocery)
4,000 sq. ft. (frozen/chill)

***Other Than Military Accounts:***
none

***1982 Military Sales:***
$4,044,345

***Number Of Principals Represented:***
62

***Military Customers:***
commissaries

***Military Locations Served:***
Colorado Springs, CO; Denver, CO; Cheyenne, WY

***Capabilities/Special Services:***
shelf stocking, display building, store reset assistance, order writing, new item presentation

***Reports Available To Principals:***
monthly movement and/or inventory reports

**MILITARY DISTRIBUTORS, INC.**
P.O. Box 10
Race Track Road
Oldsmar, FL 33557
(813) 855-1404

***Key Contacts:***
Cecil L. Lemma, Jr., General Manager; William M. Parker, President; Gerald P. Tinney, Secretary-Treasurer

***Ownership:***
private

***Established:***
1970

***Products Distributed:***
dry grocery

***Warehouse Profile:***
48,000 sq. ft. (dry grocery)

***Other Than Military Accounts:***
none

***1982 Military Sales:***
$22 million

***Number Of Principals Represented:***
62

***Military Customers:***
commissaries, exchanges

***Military Locations Served:***
AIR FORCE: South Florida Complex;
NAVY: Jacksonville Complex

***Capabilities/Special Services:***
shelf stocking, display building, store reset assistance

**MILITARY DISTRIBUTORS OF VIRGINIA, INC.**
3587 Argonne Avenue
Norfolk, VA 23509
(804) 855-0114

***Key Contacts:***
Jerry H. Jared, President; Wayne L. Duncan, Jr., Vice President–Operations; John W. Payne III, Vice President–Finance; Don Everett, Perishables Buyer; John P. Lazzari, Grocery/Operations

***Ownership:***
close corporation

***Established:***
1974

***Products Distributed:***
dry grocery, chill, frozen

***Warehouse Profile:***
81,000 sq. ft. (dry grocery)
41,000 sq. ft. (frozen/chill)

***Other Than Military Accounts:***
none

***1985 Military Sales:***
$82,000,000

***Number Of Principals Represented:***
350

***Military Customers:***
commissaries, exchanges, troop subsistence activities, food service/snack bars

***Military Locations Served:***
DOMESTIC: Ft. Lee; Richmond DGSC; Ft. Eustis; Ft. Monroe; Langley AFB; Norfolk Navy Complex; Elizabeth City Coast Guard; Ft. Bragg; Seymour-Johnson AFB; Camp Lejeune; Cherry Point.
OVERSEAS: All European and Mediterranean stores through source load: Cheatham Annex; Bayonne; Mechanicsburg; Norfolk NSC; plus Ft. Clayton, Canal Zone

***Capabilities/Special Services:***
daily delivery, shelf stocking, order writing, display building, store reset, assistance export/source load program (includes marking, strapping, USDA health certification and freezing of chilled products)

***Reports Available To Principals:***
monthly movement report by manufacturer by item by base; dead stock report showing items with no movement for 90 days; report of short shipments from the manufacturer; fill rate report; invoices to manufacturer reflect cases ordered and cases shipped, thus shortages

***Further Information:***
brochures and financial reports available upon request

**MILITARY SALES & DISTRIBUTION, INC.**
6839 "A" Market Street
El Paso, TX 79935
(915) 779-5730

***Key Contacts:***
Jim Weaver, President; Mary Glasser, Office Manager

***Ownership:***
corporation

***Established:***
1976

***Products Distributed:***
dry groceries

***Warehouse Profile:***
15,000 sq. ft. (dry grocery)

***Other Than Military Accounts:***
none

***Numbers Of Principals Represented:***
41 (plus BPAs)

***Military Customers:***
commissaries

***Military Locations Served:***
Army & Air Force in West Texas and New Mexico

***Capabilities/Special Services:***
BPAs, shelf stocking, in-store demos, store reset assistance, display building

***Reports Available To Principals:***
provided as needed

***Further Information:***
brochure available upon request

# N

### NALLEY FINE FOODS

1822 Worcester Street
Baltimore, MD 21230
(301) 244-7177/7178/7179
Washington, D.C.
(202) 331-0890

***Key Contacts:***
Clarence H. Nalley, Owner; John B. Young, Director of Military Sales; John J. Thomas, Vice President; Donald Virgil, Secretary-Treasurer

***Ownership:***
private

***Established:***
1968

***Products Distributed:***
dry grocery, chill, frozen

***Warehouse Profile:***
15,000 sq. ft. (dry grocery)
6,900 sq. ft. (frozen/chill)

***Other Than Military Accounts:***
retail grocery, delicatessens

***Military Customers:***
commissaries, exchanges, troop subsistence activities

***Military Locations Served:***
from Quantico, VA, to Mitchel Field, NY, to Carlisle Barracks, PA

***Capabilities/Special Services:***
shelf stocking, display building, store reset assistance

### NATIONAL, INC.

P.O. Box 7469
San Antonio, TX 78207
(512) 226-7361

***Key Contacts:***
Andy Obriotti, Jr., Treasurer; Jim Meyer, Military Sales Manager; Earl Zimmermann, Head Buyer, Frozen

***Ownership:***
private

***Established:***
1911

***Products Distributed:***
dry grocery, frozen

***Warehouse Profile:***
70,000 sq. ft. (dry grocery)
25,000 sq. ft. (frozen/chill)

***1982 Military Sales:***
$6 million

*WAREHOUSING AND SPEEDY DELIVERY TO THE MILITARY*

**HAMBERGER ENTERPRISES, INC.**

7204 Wimsatt Rd.
Springfield, VA. 22151

HE

Telephone:
(703) 941-8818

**Serving Delaware, Maryland, New Jersey, Pennsylvania, Virginia, and Washington, D.C.**

***Number of Principals Represented:***
18 (plus B.P.A. contracts)

***Other Than Military Accounts:***
retail grocery, convenience stores, institutional

***Military Customers:***
commissaries, exchanges

***Military Locations Served:***
AIR FORCE: Lackland AFB; Randolph AFB; Kelly AFB; Brooks AFB; Bergstrom AFB; Laughland AFB; ARMY: Fort Sam Houston; Fort Hood

### NATIONAL INDUSTRIES FOR THE BLIND

***Skilcraft Products***
524 Hamburg Turnpike
Wayne, NJ 07470
(201) 595-9200

***Key Contacts:***
George J. Mertz, Executive Vice President; Daniel J. Boucher, Vice President—Consumer Marketing; Guy DeRossi, Vice President—Finance; John Rousseau, Field Sales Manager

***Branch Offices:***
in addition to a network of 32 blind workshops across continental U.S., including one in Honolulu, HI, NIB maintains 7 distribution centers from coast to coast, plus one in Honolulu, HI

***1984 Military Sales:***
$15,000,000

***Products Distributed:***
mops, brooms, brushes, sponges, flatware, scrubbers, ironing aids, kitchen towels, dish & wash cloths, oven mitts & pot holders, cothespins and clotheslines

***Military Customers:***
commissaries, exchanges

***Military Locations Served:***
worldwide

***Further Information:***
detailed information available upon request

### NEW CENTURY BEVERAGE COMPANY

630 Valencia Street
San Francisco, CA 94110
(415) 861-8820

***Key Contacts:***
John J. Gallagher, Vice-President; John Paulson, Manager—Allied Division; David F. Plotz, Export Manager

***Branch Offices:***
Emeryville, CA
(415) 652-7710

***Ownership:***
closed corporation

***Established:***
1906

***Products Distributed:***
soft drink beverages

***Other Than Military Accounts:***
overseas distribution to authorized beverage distributors

***1984 Military Sales:***
$12,000,000

***Number of Principals Represented:***
7

***Military Customers:***
commissaries, exchanges, clubs, VA Canteens, food service/snack bars, ships stores

***Military Locations Served:***
Pacific, Asia, Southeast Asia, Australia, New Zealand

***Capabilities/Special Services:***
shelf stocking, display building, store reset assistance, local sales representation in all areas

***Further Information:***
color brochures available upon request

### NORTON FOOD COMPANY, INC.

P.O. Box 280
Urbanna, VA 23175
(804) 758-2335

***Toll Free Telephone:***
(800) 552-3835

***Key Contacts:***
Sheldon F. Hall, Jr., President; James P. Jenkins, Jr., Vice President—Operations; Sheldon F. Hall, Sr., Chairman of the Board

***Ownership:***
private

***Established:***
1950

***Products Distributed:***
dry grocery, frozen, chill, other

***Warehouse Profile:***
12,500 sq. ft. (dry grocery)
6,000 sq. ft. (frozen/chill)

***1982 Military Sales:***
$5 million

***Number of Principals Represented:***
12

***Other Than Military Accounts:***
institutional, restaurants, hotels, motels, schools, hospitals, retail grocers, chains, other

***Military Customers:***
commissaries, exchanges, clubs, VA canteen, troop subsistence activities

***Military Locations Served:***
all of Tidewater, VA, including Hampton Roads, Langley AFB, Fort Lee, Cheatham Annex, Defense General Supply Center, Bellwood and Quantico

***Capabilities/Special Services:***
shelf stocking (including selection and management), store reset assistance, export/source load documentation, strapping, packing

***Reports Available To Principals:***
movement reports (weekly, monthly, other), stock reports, promotional evaluations, shelf stocker payments

**California Pacific Associates**

P.O. BOX 16901
2131 19th AVE
SAN FRANCISCO, CALIFORNIA 94116

**COMBINING SALES WITH LOGISTICS**

Boxed Beef # SB-600-38

TELEPHONE: (415) 665-2650
TELE: 278719
CABLE ADDRESS: CALPACIFIC

Patron Awareness AMERICAN LOGISTICS ASSOCIATION

## P

### PANTRY SHELF, INC.

4954 Space Center
San Antonio, TX 78218
(512) 661-4674

***Key Contact:***
Robert S. Downey

***Products Distributed:***
fine foods and specialty items

***Military Customers:***
commissaries & exchanges

***Military Locations Served:***
South Texas

***Capabilities/Special Services:***
full service distribution, from the truck to the shelf

### PLANTATION—SYSCO

(Military Division)
2540 Shader Road
Orlando, FL 32810
(305) 299-3700

***Key Contacts:***
John R. MacFarlane, Vice President/General Manager; David Tavernier, Merchandising Manager; Will Way, Inventory Manager; Arthur Meyers, Transportation Specialist

***Ownership:***
division of Sysco Corporation

***Established:***
1965

***Products Distributed:***
chill/frozen

***Warehouse Profile:***
29,000 sq. ft. (frozen/chill)

***Other Than Military Accounts:***
none

***Number Of Principals Represented:***
49

***Military Customers:***
commissaries, exchanges, food service/snack bars

***Military Locations Served:***
AIR FORCE: Southeast and South Florida Complexes (except Seymour-Johnson AFB and Robins AFB); ARMY: Southeast Region—Ft. Gordon, Ft. Jackson, Ft. Stewart, Hunter AAF; NAVY: FSO Jacksonville, FL, and Roosevelt Roads, Puerto Rico; COAST GUARD: St. Petersburg CGB, Opa Locka Air Station; MARINES: Parris Island, SC

***Capabilities/Special Services:***
in-store merchandising programs to ensure prompt and complete shelf stocking of all frozen food products; expert assistance during frozen food section store reset; special marking and shipment to overseas facilities in Puerto Rico and Cuba

***Reports Available To Principals:***
monthly and year-to-date case movement by food manufacturer

***Further Information:***
brochures outlining in-store merchandising program available upon request

### POST SALES & SERVICE, INC.

1785 Olive Street
Beaver Heights, MD 20743
(301) 773-7111/1121

***Key Contacts:***
Joe L. Miller, Vice President; James Sherman, Sales Manager; Blanche Miller, President

***Ownership:***
corporation

***Established:***
1962

***Products Distributed:***
vitamins, teas, snack foods, cookies, candy, household cleaners, ethnic foods (Spanish, German, Kosher), dry beans, gourmet foods, canned fish, plastic plates, cups, tableware, baking cups, nuts, coffee, HABA, dietetic foods, seasonal holiday items

***Warehouse Profile:***
12,000 sq. ft. (dry grocery)

***Other Than Military Accounts:***
none

***Number Of Principals Represented:***
11

***Military Customers:***
commissaries

***Military Locations Served:***
Aberdeen Proving Ground, MD; Edgewood Arsenal, MD; Walter Reed AMC, MD; Ft. Ritchie, MD; Ft. Meade, MD; Andrews AFB, MD; Ft. McNair, Wash., DC; Bolling AFB, Wash., DC; Ft. Belvoir, VA; Cameron Station, VA; Vint Hill Farms Stn., VA; Carlisle Barracks, PA; New Cumberland AD, PA; Dover AFB, DE; MCB Quantico, VA

***Capabilities/Special Services:***
shelf stocking, display building, store reset assistance, guarantee all merchandise sold (including holiday merchandise)

### POTOMAC FOOD DISTRIBUTORS, INC.

6021 Farrington Avenue
Alexandria, VA 22304
(703) 823-0400

***Key Contacts:***
Wally Cook, President; Steven Cook, Director of Operations

***Ownership:***
private

***Established:***
1976

***Products Distributed:***
dry grocery, chill, frozen

***Warehouse Profile:***
21,000 sq. ft. (dry grocery)
22,000 sq. ft. (frozen/chill)

***Other Than Military Accounts:***
none

***1982 Military Sales:***
$13 million

***Number Of Principals Represented:***
95

***Military Customers:***
commissaries, exchanges

***Military Locations Served:***
AFCOMS Capitol Area Complex; TSA Northeast Commissary Region; AAFES Capitol Exchange Region; MCB Quantico, VA; NAVRESSO Patuxent River Region

***Capabilities/Special Services:***
shelf stocking, store reset assistance, daily delivery, less than 24-hour service

***Reports Available To Principals:***
weekly and monthly sales reports by line item, base, broker, salesman, or manufacturer

### S. PRAWER & COMPANY

150 Read Street
P.O. Box 1400
Portland, ME 04104
(207) 775-0223

***Key Contacts:***
Lou Janson; Gilbert Prawer, Vice President; Marilyn Prawer

***Established:***
1934

***Products Distributed:***
dry grocery, candy, refrigerated foods, non-foods, general merchandise, dairy, chilled, deli items

***Warehouse Profile:***
200,000 sq. ft. (dry grocery)
25,000 sq. ft. (frozen/chill)

***Number Of Principals Represented:***
180

***Military Customers:***
commissaries & exchanges

***Military Locations Served:***
Northeast and Mid-Atlantic states as far south as Virginia

***Capabilities/Special Services:***
on-time delivery service to more than 55 commissary stores

***Reports Available To Principals:***
monthly movement reports

## Q

### QUALITY BRANDS DISTRIBUTING, INC.

P.O. Box 7247
Colorado Springs, CO 80933
(303) 594-0182

***Key Contacts:***
Jerry O. Boe, President; Patricia Boe, Secretary/Treasurer

***Ownership:***
corporation

***Established:***
1976

***Products Distributed:***
dry grocery, chill, frozen

***Warehouse Profile:***
4,000 sq. ft. (dry grocery)
2,000 sq. ft. (frozen/chill)

***Other Than Military Accounts:***
none

***1984 Military Sales:***
$1,878,545

***Number Of Principals Represented:***
12

***Military Customers:***
commissaries, exchanges

***Military Locations Served:***
Colorado Springs, CO; Denver, CO; Cheyenne, WY

***Capabilities/Special Services:***
shelf stocking, display building (and display booking), store reset assistance, daily delivery

***Reports Available To Principals:***
movement reports

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# R

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## RICHFOOD, INC.

P.O. Box 26967
Richmond, VA 23261-6967
(804) 746-6329

***Toll Free Telephone:***
(800) 552-7974 (in VA)
(800) 446-7905 (outside VA)

***Key Contacts:***
C. Aubrey Nicklas, Military Sales; Stewart D. Street

***Ownership:***
co-op

***Established:***
1935

***Number Of Principals Represented:***
59

***Products Distributed:***
dry grocery, chill, frozen, meats, dairy, produce, general merchandise, & HABA

***Warehouse Profile:***
860,000 sq. ft. (dry grocery)
430,000 sq. ft. (frozen/chill)
65,000 sq. ft. (dairy)

***Othen Than Military Accounts:***
620 retail grocery accounts

***Military Customers:***
commissaries, exchanges, troop subsistence activities, overseas

***Military Locations Served:***
all bases within the states of Delaware, Virginia, West Virginia, Maryland, North Carolina and Washington, D.C., plus all ports of embarkation on the East Coast

***Capabilities/Special Services:***
shelf stocking, display building, store reset assistance, export/source load/documentation capabilities, seminars, store engineering, electronic ordering, accounting, advertising & printing

***Reports Available To Principals:***
movement, pricing

***Further Information:***
brochures covering the full spectrum of management, sales, pricing, store maintenance & personnel available upon request

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# S

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## SAFEWAY STORES, INC.
### Military Distribution Division

1300 Diamond Springs Road
Suite 500
Virginia Beach, VA 23455
(804) 460-3050

***Key Contacts:***
Bernie McHugh, Director; Maggie Byrum, Administrative Assistant

***Branch Office:***
Chester, VA
(804) 460-3051

***Ownership:***
corporation

***Established:***
Safeway Stores, Inc. (1926)
Military Distribution Division (1983)

***Products Distributed:***
dry grocery, frozen, perishables, health & beauty aids, deli, chilled

***Warehouse Profile:***
320,000 sq. ft. (dry grocery)
70,000 sq. ft. (frozen/chill)

***Other Than Military Accounts:***
retail grocery

***Military Customers:***
commissaries, exchanges, troop subsistence activities

***Military Locations Served:***
Norfolk Navy Complex; Norfolk Navy Offshore Facilities; Richmond DGSC; Ft. Lee; Ft. Eustis; Ft. Monroe; Langley AFB; Ft. Bragg; Seymore-Johnson AFB; Camp Lejeune; Cherry Point; Navy Exchange CD-1; European Commissary Stores

***Capabilities/Special Services:***
assorted custom-designed programs available to manufacturers, brokers and commissaries, including shelf stocking, display building, source load/documentation capabilities

***Reports Available To Principals:***
reports available include normal requirements for executive business analysis and control such as monthly movements, in-stock, order/shipped information, etc.

***Further Information:***
available as required

## SCRIVNER INC.

1101 S.E. 59th Street
P.O. Box 26146
Oklahoma City, OK 73126
(405) 670-7207

***Toll Free:***
(800) 654-5685 (outside OK)
(800) 522-4753 (in OK)

***Key Contacts:***
William A. Coffey, Director of Military Sales; Mark E. Chism IV, Assistant Director of Military Sales; Mia Nichols, Office Manager; Chondra Cheatham, Sales Representative

***Branch Office:***
Victoria, TX
(512) 573-5201

***Ownership:***
close corporation

***Established:***
1912

***Products Distributed:***
dry grocery, dairy, frozen, produce, fresh meats, and HABA

***Warehouse Profile:***
400,000 sq. ft. (dry grocery)
108,000 sq. ft. (frozen/chill)

***Other Than Military Accounts:***
retail grocery, restaurants

***1984 Military Sales:***
$39,000,000

***Number Of Principals Represented:***
175

***Military Customers:***
commissaries, exchanges (shoppettes), clubs, troop subsistence activities, food service

***Military Locations Served:***
Oklahoma, North Texas, South Kansas

***Capabilities/Special Services:***
shelf stocking, store reset assistance

***Reports Available To Principals:***
buyers stock selection catalogs; merchandise on hand, monthly dollars sold, base item velocity reports

## SELECT-SYSCO FOODS, INC.

P.O. Box 3097
22885 Amador Street
Hayward, CA 94540
(415) 785-1000

***Key Contacts:***
E.R. Rasnick, Vice President; Dee Akers, Military Sales Manager

***Ownership:***
subsidiary of Sysco Corporation (Houston, TX)

***Established:***
1950

***Products Distributed:***
frozen foods only

***Warehouse Profile:***
50,000 sq. ft. (frozen/chill)

***Other Than Military Accounts:***
retail stores

***Number Of Principals Represented:***
42

***Military Customers:***
commissaries, troop subsistence activities, overseas shipping agencies

***Military Locations Served:***
Northern California, Reno, NV

***Capabilities/Special Services:***
store reset assistance, export van loading

***Further Information:***
delivery schedule available upon request

### SERVICE DELI, INC.

P.O. Box 58581
Los Angeles, CA 90058
(213) 582-5623

***Key Contacts:***
Gloria Ferry, President; Andy Stylianore, Vice President; Marvin Haberman, Secretary-Treasurer & General Manager

***Ownership:***
private

***Established:***
1978

***Products Distributed:***
dry grocery, chill products

***Warehouse Profile:***
500 sq. ft. (dry grocery)
4,000 sq. ft. (chill)

***Other Than Military Accounts:***
none

***1982 Military Sales:***
$2 million

***Number Of Principals Represented:***
30

***Military Customers:***
commissaries, exchanges, food service/snack bars

***Military Locations Served:***
AAFES Golden Gate Exchange Region; AFCOMS Cal-Nev Complex, Northern California Complex, Northwest Complex; NB Long Beach; Marine Corps West Coast Commissary Complex

***Capabilities/Special Services:***
operate and promote delicatessens and service bakeries; services include shelf stocking, display building, professional in-store merchandising programs

***Reports Available To Principals:***
any type of report requested

***Further Information:***
descriptive brochure of in-store merchandising and deli-bakery operation service available upon request

### SHAROFF DISTRIBUTION

3825 Lafayette Street
P.O. Box 17627 T.A.
Denver, CO 80217
(303) 294-0555

***Key Contacts:***
Cynthia Stephens, Director Military Sales; Garry Fox, President

***Ownership:***
corporation

***Established:***
1930

***Products Distributed:***
dry grocery, chill & frozen

***Warehouse Profile:***
20,000 sq. ft. (dry grocery)
20,000 sq. ft. (frozen/chill)

***Other Than Military Accounts:***
food service

***Number of Principals Represented:***
50

***Military Customers:***
commissaries, exchanges, clubs, VA canteens, troop subsistence activities, food service/snack bars

***Military Locations Served:***
Ft. Carson, CO; Fitzsimmons A.M.C. Hospital, CO; USAF Academy, CO; Lowry AFB, CO; Peterson AFB, CO; F.E. Warren AFB, WY

***Capabilities/Special Services:***
shelf stocking

***Reports Available To Principals:***
various computerized reports including weekly recap of deliveries, and monthly recap by product line by base

### S.M. FLICKINGER CO., INC.

P.O. Box 4812
6361 Thompson Road
Syracuse, New York 13221
(315) 437-7120

***Key Contacts:***
Pat Cupelo, Division Manager; Dick Dunham, Merchandising Manager; Frank Emmi, Special Projects; Geraid Totoritis, Sales Manager

***Ownership:***
division of Scrivner, Inc.

***Products Distributed:***
dry grocery, chill, frozen, meat, and produce

***Other Than Military Accounts:***
retail grocery

### SPILMAN COMPANY, INC.

P.O. Box 2086
Livermore, CA 94550
(415) 455-6472

***Key Contacts:***
Don Spilman, President/Owner; Paul Fowler, Sales/Service; Dave Parmenter, Operations Manager

***Ownership:***
close corporation

***Established:***
1979

***Products Distributed:***
dry grocery, frozen, chill

***Warehouse Profile:***
32,000 sq. ft. (dry grocery)
8,000 sq. ft. (frozen/chill)

***Other Than Military Accounts:***
none

***Number Of Principals Represented:***
110

***Military Customers:***
commissaries, exchanges, clubs, troop subsistence activities, ships' stores

***Military Locations Served:***
all military activities in the Northern California area and overseas

***Capabilities/Special Services:***
regularly planned delivery schedules for all commissaries, source load program for shipments to Far East and Hawaii

***Reports Available To Principals:***
monthly inventory and movement reports

***Further Information:***
brochures available upon request

### STERLING DOWNEY SALES COMPANY

4954 Space Center
San Antonio, TX 78218
(512) 661-8266

***Key Contacts:***
Eddie Schimmel, Vice President–Sales; Linda Pilano, Office Manager; Sterling Downey, President; Brent Downey, Sales–Service

***Ownership:***
private

***Established:***
1962

***Products Distributed:***
dry grocery, chill, frozen, HABA

***Warehouse Profile:***
60,000 sq. ft. dry grocery
12,000 sq. ft. (frozen/chill)

***Other Than Military Accounts:***
none

***1983 Military Sales:***
$18,000,000

***Number of Principals Represented:***
115

***Military Customers:***
commissaries

***Military Locations Served:***
Fort Sam Houston, Fort Hood, Bergstrom AFB, Randolph AFB, Lackland AFB, Kelly AFB, Brooks AFB, Laughland AFB

***Capabilities/Special Services:***
shelf stocking, display building, store reset assistance, VIP deliveries, broker-salesmen reports, and order writing assistance in their absence

***Further Information:***
description of service and operating procedures for complete distribution to commissaries available upon request

**SUPER VALU STORES INC.**
**Albuquerque Division**
P.O. Box 25184
Albuquerque, NM 87125
(505) 243-5621

***Key Contact:***
Alan Koffler, Military Sales Manager

***Products Distributed:***
complete food wholesaler

***Military Customers:***
commissaries

***Military Locations Served:***
New Mexico, West Texas

**SWEENEY & COMPANY, INC.**
Box 33850
San Antonio, TX 78233
(512) 533-1281

***Key Contacts:***
Travis Owens, President; Robert Smith, Director of Military Sales

***Ownership:***
division of Grocery Supply Company

***Established:***
1929

***Products Distributed:***
dry grocery, chill, frozen

***Warehouse Profile:***
336,800 sq. ft. (dry grocery)
55,000 sq. ft. (frozen/chill)

***Other Than Military Accounts:***
retail grocery

***Number Of Principals Represented:***
90

***Military Customers:***
commissaries, exchanges, troop subsistence activities

***Military Locations Served:***
San Antonio, Corpus Christi; Del Rio; Killeen; Austin; Ft. Worth; Abilene; San Angelo; Beeville; Kingsville

***Capabilities/Special Services:***
store reset assistance

***Reports Available To Principals:***
monthly movement reports

**SWEET LIFE FOODS**
**Northboro Division**
P.O. Box 638
Northboro, MA 01532
(617) 393-6711

***Key Contact:***
Connie Nassar, Director–Military Sales

***Ownership:***
private

***Established:***
1924

***Products Distributed:***
dry grocery

***Warehouse Profile:***
420,000 sq. ft. (dry grocery—Northboro only)

***Other Than Military Accounts:***
supermarkets, restaurants, schools, hospitals, clubs

***Military Customers:***
commissaries, exchanges

***Military Locations Served:***
all commissaries in the northeast U.S.; NAVRESSO's Davisville, RI exchange complex

*Continued on page 102*

FLASH BRAND

*Military Distributors since 1955*
*Distributors of frozen, chilled, and dry items to military commissaries and exchanges in Southern California and Nevada.*

**FLASH STEAK COMPANY, INC.**

*7959 Paramount Boulevard, Pico Rivera, CA 90660 (213) 949-2558 Contact: Chris M. Sanchez (15)*

***Capabilities/Special Services:***
full staff assistance with any commissary requirements or requests

## T

### TRI-STATE ASSOCIATED GROCERS

1000 Hawkins
P.O. Box 9938
El Paso, TX 79990
(915) 772-5241

***Key Contacts:***
Al Gauthier, Military Sales Manager; Ron McCrobie, Head Buyer; Joe Mora, Warehousing and Distribution

***Ownership:***
corporation

***Established:***
1953

***Products Distributed:***
dry grocery, chill, frozen

***Warehouse Profile:***
263,000 sq. ft. (dry grocery)
85,000 sq. ft. (frozen/chill)

***Other Than Military Accounts:***
retail grocery

**Number of Principals Represented:**
40 (plus BPAs)

***Military Customers:***
commissaries, shoppettes, troop subsistence activities

***Military Locations Served:***
New Mexico and West Texas; ARMY: Ft. Bliss; White Sands Missile Range; AIR FORCE: Holloman AFB; Kirtland AFB; Cannon AFB; Reese AFB

***Reports Available To Principals:***
movement reports

***Further Information:***
brochures available upon request

## W

### WEST COAST GROCERY COMPANY

1525 East D Street
Tacoma, WA 98401
(206) 593-3142

***Key Contacts:***
Charlie Hyde III, Vice President; David McCarthy, Military Sales Manager; Rose Nash, Military Sales; Verle Bryant, Buyer

***Branch Offices:***
Spokane, WA
(509) 928-7110

***Ownership:***
division of Super Value

***Established:***
1891

***Products Distributed:***
dry grocery, frozen, non-foods, HABA, chill

***Other Than Military Accounts:***
retail grocery

***Military Customers:***
commissaries, exchanges

***Military Locations Served:***
Alaska, Montana, Washington

### WESTERN DISTRIBUTION SERVICES, INC.

19809 89th Ave. South, Bldg. G
P.O. Box 5429
Kent, WA 98064-5429
(206) 251-0568

***Key Contacts:***
John Naylor, President; Paul DiJulio, Vice President; Mike Doherty, Military Sales Manager

***Branch Offices:***
Kent, WA
(206) 872-5725

Renton, WA
(206) 251-0512

***Ownership:***
close corporation

***Established:***
1980

***Number of Principals Represented:***
30

***Products Distributed:***
dry grocery

***Warehouse Profile:***
500,000 sq. ft. (dry grocery)

***Military Customers:***
commissaries, exchanges, troop subsistence & food service

***Military Locations Served:***
Washington, Oregon, Idaho, Utah, Wyoming, Alaska, Montana

***Other Than Military Accounts:***
retail grocery, medical care facilities

***Capabilities/Special Services:***
export/source load, labeling/replacing USDA recall

***Reports Available To Principals:***
movement reports

***Further Information:***
free company brochures available upon request

### WETTERAU INCORPORATED

P.O. Box 10408
2001 Mabeline Road
Charleston, SC 29411
(800) 797-6700

***Key Contacts:***
Jack Lloyd, President & General Manager; Ken Gorman, Vice President & Controller; Joe Neuburger, Director of Merchandising

***Ownership:***
corporation

***Established:***
1869

***Products Distributed:***
dry grocery, chill

***1984 Military Sales:***
$25,000,000

***Other Than Military Accounts:***
retail grocery stores in North Carolina, South Carolina & Georgia

***Number of Principals Represented:***
80

***Military Customers:***
commissaries, exchanges, ships stores

***Military Locations Served:***
Georgia, South Carolina, & North Carolina

***Capabilities/Special Services:***
full service wholesaler

***Reports Available To Principals:***
movement by vendor

### WINTER HILL FROZEN FOODS & SERVICES, INC.

10 Otis Street
Westboro, MA 01581
(617) 366-9601

***Key Contacts:***
Hal Rudnick, President; Geroge Duchaine, Head Buyer; Bob Nazarian, Vice President–Sales

***Ownership:***
corporation

***Established:***
1959

***Products Distributed:***
frozen and chill

***Warehouse Profile:***
65,000 sq. ft. (frozen/chill)

***Other Than Military Accounts:***
retail grocery

***Number Of Principals Represented:***
200

***Military Customers:***
commissaries, exchanges

***Military Locations Served:***
all New England, plus upstate New York (including USMA West Point and Stewart Airfield)

***Capabilities/Special Services:***
assistance with frozen food case resets, case layouts, labor, signs, sales, etc.; advise on new item selection, store demonstrations, special sales originated in-house; sales representation by experienced sales staff

***Reports Available To Principals:***
weekly sales bulletin, monthly movement reports, street monies available, suggested prices at different percent upcharges

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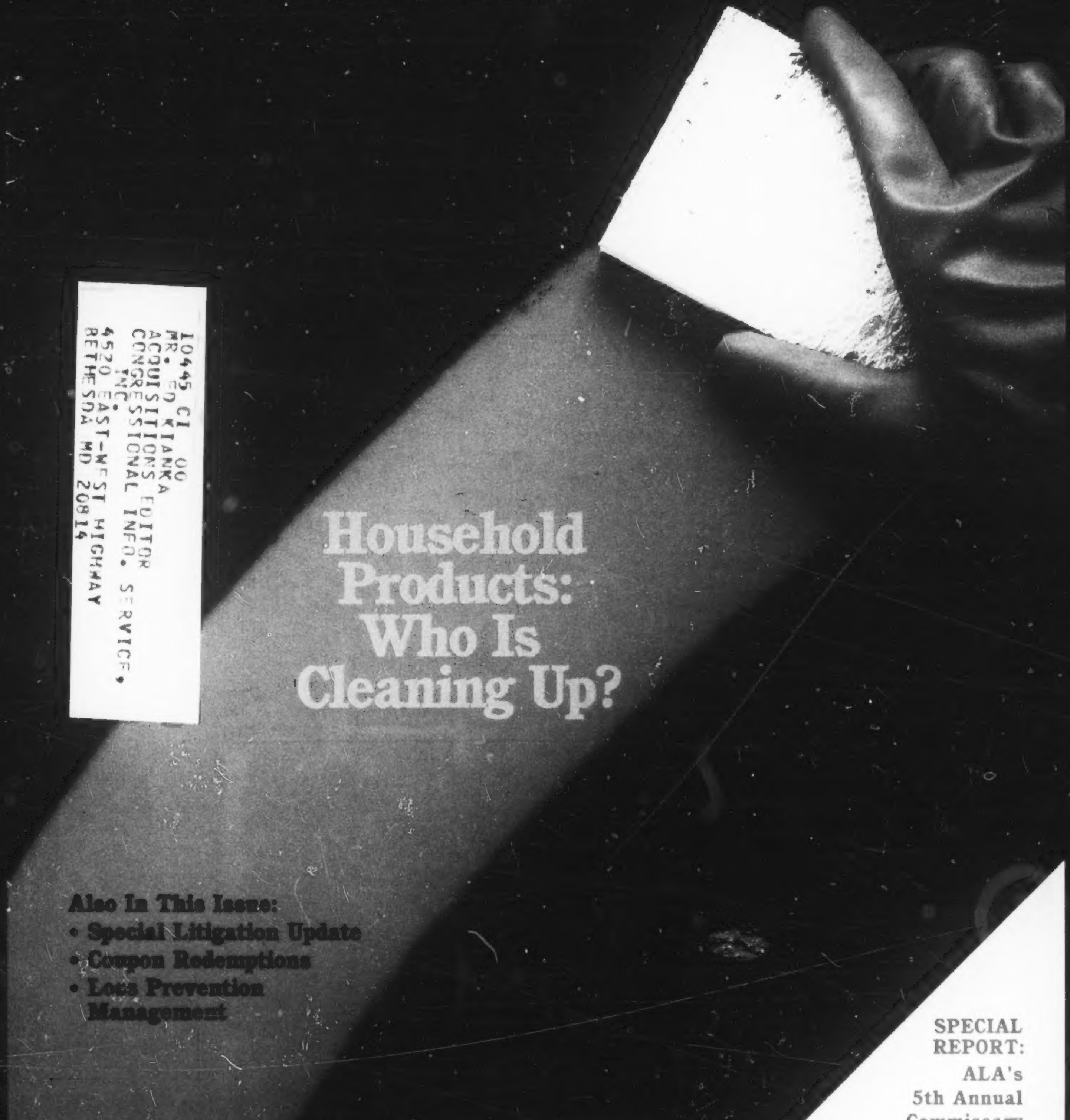
# Interservice

THE JOURNAL OF THE AMERICAN LOGISTICS ASSOCIATION
SPRING 1986



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4520 EAST-WEST HIGHWAY
BETHESDA MD 20814

## Household Products: Who Is Cleaning Up?

**Also In This Issue:**
- Special Litigation Update
- Coupon Redemptions
- Loss Prevention Management

**SPECIAL REPORT:**
**ALA's 5th Annual Commissary Sales Report**

PUBLISHED BY THE AMERICAN LOGISTICS ASSOCIATION

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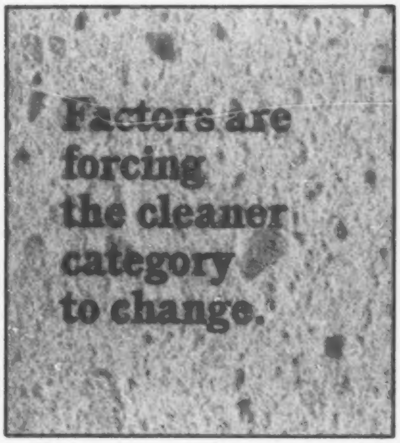
COVER PHOTOGRAPH BY DEBBI BELL

# Household Products: Who Is Cleaning Up?

### BY MIKE HAWKINS



Today's household cleaning market is like a wide, lazy river. On the surface, it seems calm and steady. It's slow in some places and fast in others, but overall the pace never changes.

Just like that river, though, the structure of today's household cleaner category is changing below the surface. The pressure of a category that doesn't seem inclined to grow quickly is applied to the subcategories. That's where the competition is. New products are competing with old products. New ideas are coming to the surface for a quick gasp of air, and the consumer is there, making decisions about the future of products.

Who will dominate? What new types of products are shoppers looking for and why will they make their decisions are just a few of the questions that must be answered. What makes this river flow?

In the marketplace, the question of who runs the supply and demand river is always arguable. Does the consumer control what hits the market by expressing demand, or do marketing research teams decide what's coming next?

With the many products in this segment of the market, at least, it appears that the consumer is in charge. When today's shopper goes after household cleaning products, it's a no-holds barred, "give-me-what-I-want" situation. And the shopper wants it all; a bargain, a nice smelling heavy-duty all-purpose liquid, special cleaners for today's surfaces, products that do more than one job, and products that will save time. Time is important to today's shopper. Quality time. Time with the family, time with friends, time to be alone.

This is true in the market at large, and especially so in the military resale market, with the increasing number of retirees who want to spend less time cleaning and more time enjoying their retirement. The military demographics are also beginning to include more and more two-earner households and single parent families, just as the civilian market is. All of these factors are forcing the household cleaner market to change, inside, down beneath the surface.

The category itself has grown so large and encompasses so many items that it's impossible to sum it up with a nice, tight list. The term used to describe the category differs from one service to another and from commissary to exchange. Household products are household cleaners are household goods with minor variations. But they all include a number of basic items. Cleaning supplies such as all-purpose liquids, liquid and powdered dish or laundry detergents, bathroom cleaners, scrub pads, paper towels, and the remainder of the "let's get it clean around the house" items are of course within the category. But it also includes products such as pesticides. Ant and roach sprays, the now-popular bug "bombs," and other systems for controlling insects and rodents are some examples.

Then there are the special cleaners. The supergrowth subcategory of vinyl protectors, for instance. These and other products

*Mike Hawkins is a San Antonio, TX-based freelance writer. He was on active duty in the U.S. Air Force until last year, serving 11 years as a public affairs specialist. His last 6 years were spent on assignment to headquarters of the Air Force Commissary Service.*

# Liquid cleaners reflect the trend toward convenience.

## TABLE 1

**Top Five Household Cleansing Product Categories Ranked by Sales Growth for 1983 to 1984**

| Product | % Growth |
|---|---|
| Vinyl protectants | 25.6% |
| Bathroom cleaners | 17.3 |
| Carpet deodorizers | 15.2 |
| Toilet bowl cleaners | 13.7 |
| Air fresheners | 13.3 |

Source: Charles H. Kline and Co., Inc.

all fall within the household cleaner category.

In fact, there are more than 5,000 separate products in the category on the market today, according to Charles H. Kline and Co., Inc. spokesperson Betsy Donovan. The Fairfield, NJ-based Kline and Co. tracks, among other things, sales data and trends in the household products market.

Donovan says that there are about 200 companies putting these products out, but the top three firms, all with annual sales of $670 million and more, make up 44 percent of the total industry sales volume as of 1984. According to Kline and Co. figures, those three are Procter and Gamble, with 29 percent of the total, followed by Lever Brothers and Colgate-Palmolive, each with an eight percent share.

The total sales volume of household cleaning products in 1984 exceeded $8.9 billion, which is up by 7.1 percent from 1983 says Donovan. Most marketing and sales representatives tend to agree that the sales have been flat, but steady.

In the military resale market, specifically, there's some disagreement.

For instance, Mike McClain, senior buyer for the Army and Air Force Exchange Service's (AAFES) hardware and cleaning supplies unit, says AAFES has had significant success in the category for the last several years. He cites a more than $2.2 million sales increase from 1984 to 1985.

"They're becoming very important to us," he comments. "Many of our cleaning supplies are showing absolutely fantastic sales."

**Patrons are saving big at their commissary.**

AAFES has a number of its own brands on the shelves to give shoppers prices comparable to those in commissaries and off-base "loss leaders" in the house brand categories.

McClain stresses that the items are made by companies which are active in the house brand market, and products are tested and reviewed in AAFES quality assurance labs.

He's also the first to admit that while many of his customers are zeroing in on the savings offered by the AAFES brand, others are extremely brand-conscious. With this in mind, there's been no de-emphasis on brand names in Army and Air Force exchanges.

"We always carry the number one, and some number two or three best-sellers, depending upon the size of the category. In essence, our managers are free to stock what sells."

McClain sees a continued trend of healthy sales growth in exchanges. Through November last year, sales were already leading 1984 by almost $2 million.

The story's a bit different at the Air Force Commissary Service (AFCOMS). Gary Duell, chief of AFCOMS merchandising and marketing branch, says that sales were not only flat for 1984, they actually declined as a percentage of total grocery sales. In 1983, sales of household cleaning products accounted for 13.73 percent of grocery sales, while the figure dropped to 13.67 percent in 1984.

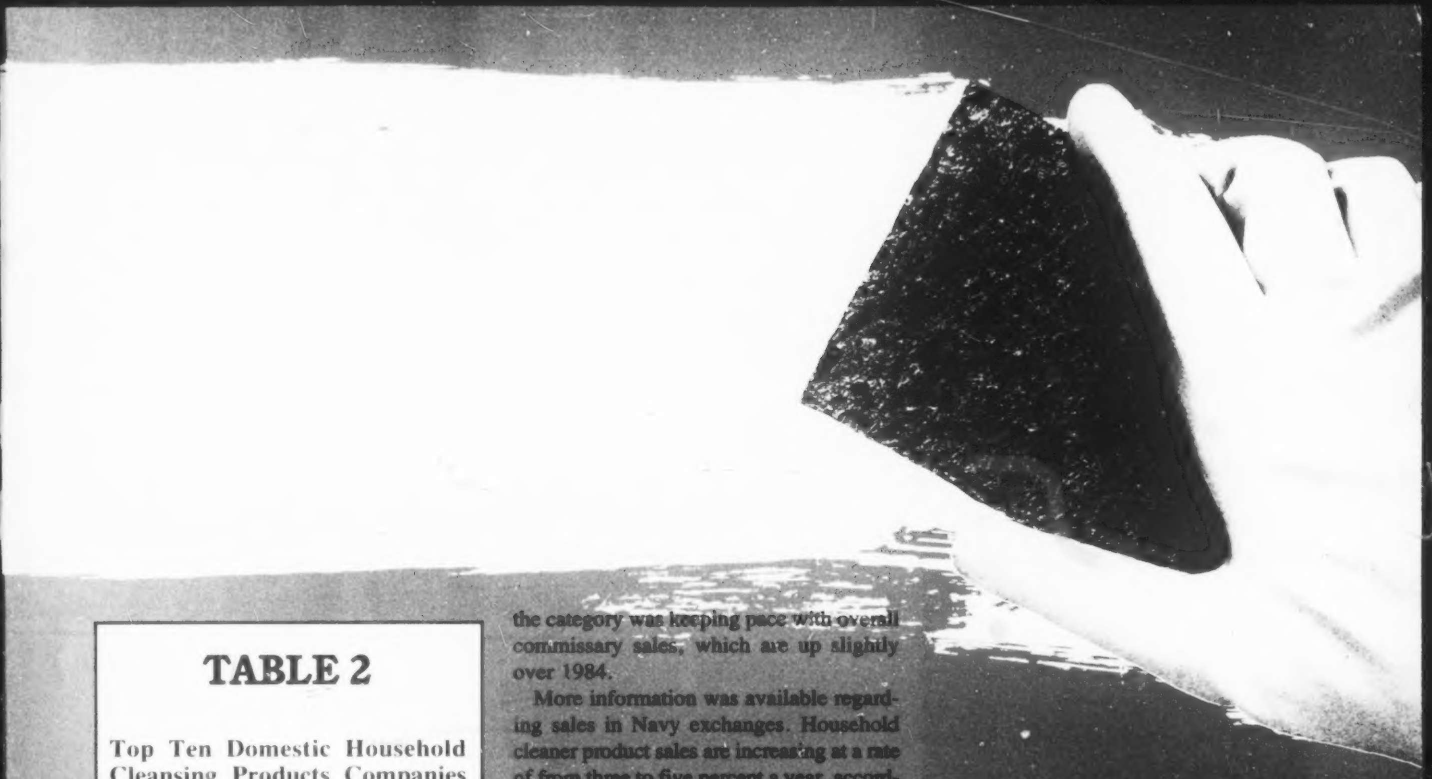
"The category keeps getting bigger and bigger," he explains, "and there are new entries all of the time. But sales overall just haven't grown that much." The actual growth of sales for the category was less than one-tenth of one percent, according to Duell.

Still, the market's not diminishing, either. Patrons are saving big money at their commissary on household cleaners, and they know it.

"Our customers realize that there's a big mark-up, anywhere from 16 to 30 percent on detergent items, for instance, when they shop in the civilian retail market. The commissary will always show them a hefty savings on these items."

Another thing that attracts military shoppers to the commissary for these products is the size of the items the military stores carry.

"Most military customers shop less frequently than civilians," Duell comments. "When they come in, they want to buy the bigger sizes of almost any product, and that's especially true in this category. Because of that, you'll very seldom find



## TABLE 2

### Top Ten Domestic Household Cleansing Products Companies Based on 1984 Sales

| Company | % of Total |
|---|---|
| Procter & Gamble | 29% |
| Lever Brothers | 8 |
| Colgate-Palmolive | 8 |
| Clorox | 5 |
| S.C. Johnson | 5 |
| Sterling Drug | 4 |
| Purex | 4 |
| American Home Products | 3 |
| Amway | 3 |
| Morton Thiokol (Texize) | 3 |
| All other | 28 |
| **Total** | **100%** |

Source: Charles H. Kline and Co., Inc.

49-ounce boxes of detergent or the 12- to 16-ounce bottles of liquid detergents. I don't think you'll ever find a one-half pint bottle of a cleaner. As a rule, we always have the bigger sizes."

AFCOMS is considering additions to the large sizes by including the 20-pound pail of one leading detergent that's currently sold primarily in discount warehouses. Duell believes this would spur an increase in sales and savings for customers.

At Navy Resale and Services Support Office (NAVRESSO) headquarters, no sales or percentage of sales figures are available for commissaries, but NAVRESSO spokesperson Maureen Murray did say that the category was keeping pace with overall commissary sales, which are up slightly over 1984.

More information was available regarding sales in Navy exchanges. Household cleaner product sales are increasing at a rate of from three to five percent a year, according to Glen Hoffman, a household supplies buyer in NAVRESSO's exchange merchandise division. Sales are stable, he says, and account for about 70 percent of the overall household supplies category, or about $12 million in sales during 1984.

Jerry Brazil, chief of the U.S. Army Troop Support Agency's (TSA) Midwest Commissary Region's merchandising management branch, was impressed with the unusually high number of new entries in the category this year. He's carefully watching the changes taking place within the subcategories.

"First there was liquid Tide. It hit the market with a major introduction. Of course, it wasn't the first liquid detergent, but it really shook things up. It blasted the market with advertising."

The whole range of liquid cleaners is mushrooming, he says. It's part of the trend towards convenience, and is beginning to steal market share from the long entrenched powdered detergents.

"Consumers really like liquids," he nods his head for emphasis. "They're convenient, and that's the name of the game today. I don't know if people are really saving money on them, and I'm not sure that's important to the shopper in this case. Whatever, they're certainly buying liquids."

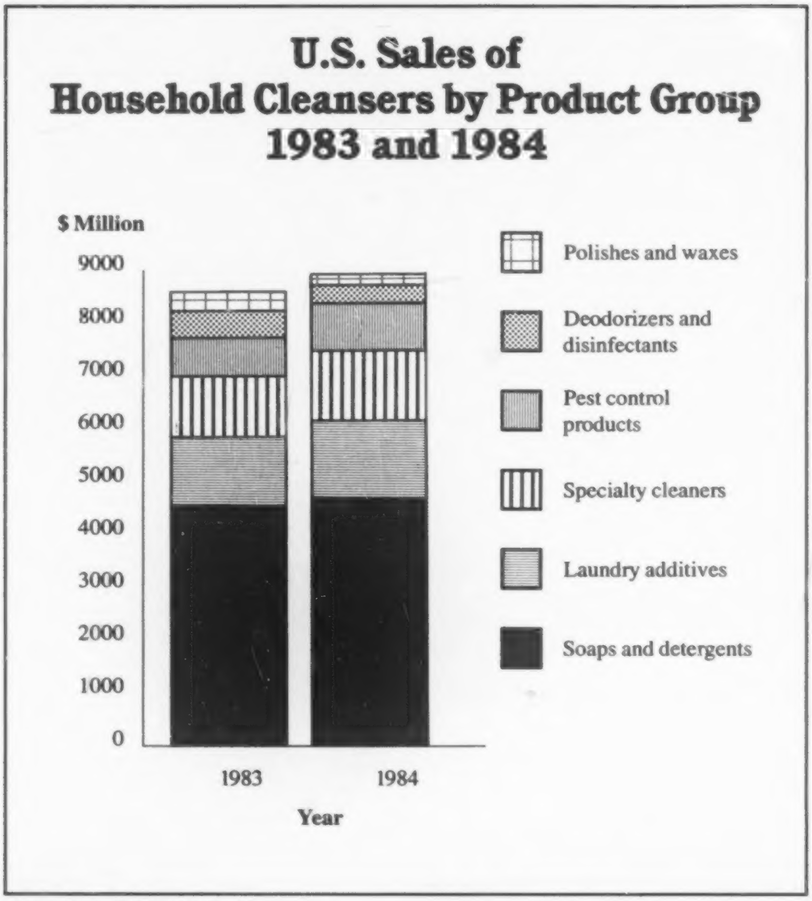
Market consultant Betsy Donovan at Kline and Co. explains. "There's a clear trend nationwide towards products which offer the consumer more convenience. In the household cleaner category this is especially noticeable." Societal changes mean that people are today more willing to

## TABLE 3

### Seventeen Fastest-Growing Suppliers of Household Cleansing Products Based on 1983–84 Sales

| Company | % Growth |
|---|---|
| Church & Dwight | 121% |
| Reckitt & Colman | 105 |
| Willert Home Products | 79 |
| McKesson | 39 |
| Dow | 19 |
| Kiwi Polish | 18 |
| Bayer AG | 18 |
| Economics Laboratory | 14 |
| Sandoz | 13 |
| Bristol-Myers | 11 |
| Greyhound | 11 |
| Morton Thiokol | 11 |
| Clorox | 10 |
| Ciba-Geigy | 9 |
| Lever Brothers | 8 |
| A.H. Robins | 8 |
| Blue Lustre | 8 |

Source: Charles H. Kline and Co., Inc.



*Source:* Charles H. Kline and Co., Inc.

> **Liquid, all-purpose cleaners are feeling heat from competition.**

spend their time working at their jobs or careers, Donovan says, which means housecleaning is lower on their list of priorities.

Other military merchandising specialists see the same trends, towards liquid cleaners and other conveniences.

"We'll continue to see liquid soaps and detergents of all kinds play a greater and greater role in the marketplace," says Mike McClain at AAFES. He also cites the rollout of Tide liquid. Even though sales figures for the products weren't available, he was tracking the success in the three regions taking part in the rollout. The results, he said, were impressive. The product is doing "very, very well."

Gary Duell sees the same future for liquids. "We'll have a lot of competition in the subcategories as the liquids and other more convenient products enter the market. New ideas are hitting the shelves all the time. Just look at the concentrates. A couple of years ago, Procter and Gamble introduced an extra-concentrated form of Downy Fabric Softener. They took that formula and concentrated it again. Now, you've got a bottle half the size of the original that does the same amount of work. People really like that sort of thing. Innovations like this are going to make the difference. People will shop around for products they like, looking for the easiest and quickest ones to use that will still do the job they want done."

Even the liquid, all-purpose cleaners are beginning to feel the heat of increased competition on their glass or plastic heels. The market share of established brands isn't increasing, just getting spread around, according to Jim Anagnost, military sales director for American Cyanamid, manufacturer of Pine Sol, the top seller in the subcategory.

What to do? Pine Sol is testing a new, spray version of its product. And that brings up the subject of line extensions. Others call it "copy branding" or "me too-ing." Whatever the name, it's the same process.

A company with a well-established successful brand introduces a new or altered product using the name of its top line. The benefits are obvious: instant recognition and consumer trust. The product introduced may not even be new, just a clone of some other product. Thus the "copy brand" and "me-too" labels.

But these, like other new products, are exacerbating the battle for shelf space. Since sales aren't escalating, most commissaries and exchanges will continue to devote the same space to the category. Shoppers will pick the winners and the losers while they take advantage of the highly competitive rollout promotions.

Despite the increased competition and eventual losers, line extensions and new products are the only thing that make sense for many manufacturers.

Tom Tierney, brand manager of the home products division at 3M Co., cites the success of their Scotchguard Carpet Cleaner and Protector and Upholstery Cleaner and Protector. They were introduced in the past two years as line extensions of the Scotchguard name which, Tierney points out, has a 95 percent recognition factor among consumers. Judy Borowski, spokesperson for 3M Co., comments that line extensions are one way to use the equity which a company has invested in a well-established brand or product.

Another line extension, consisting of newcomers introduced in February and March this year, came from American Cyanamid, says Jim Anagnost. Springboarding off of their Combat Roach Control System, which *Fortune* named as one of 1985's "Products of the Year," they'll introduce Combat Ant Control, Combat Fire Ant Control, and Combat Large Roach Control products.

The exchanges and commissaries eagerly wait the rollouts. They're all ready to jump on the promotional bandwagon.

At AFCOMS, Duell schedules many rollouts as mandatory sales items for commissaries. The two largest sizes of Clorox's new "no odor" bleach, for example, were carried in all Air Force commissaries.

The same product was rolled out onto the shelves of Army commissaries in TSA's Midwest Region in February, says Brazil. He plans on marketing the "old" and "new" Clorox side by side to give customers the obvious choice.

"We try very hard," he says, "to get new products in our stores as quickly as possible. We'll roll out regionally or nationally. That's especially true when a number-one company is pushing a product. But even when that's not the case, we know that consumers are going to try new items, and we want to have them."

AAFES has changed its merchandising policy about household cleaner rollouts, McClain explained.

"Not long ago, we were reluctant to roll out regionally, but that's not the case today. In fact, we now often prefer it. It's very lucrative for our customers when they can take advantage of the promotions available on new item introductions."

In addition, he says, buyers at AAFES are always monitoring the Nielsen and SAMI reports for any new items that can be added to the category, to ensure that the assortment reflects the national best-sellers.

**AAFES changed its policy on rollouts.**

Promoting the competitiveness of the household cleaner subcategory wars is the big dollar value of cents-off coupons usually associated with the category. When consumers pay $7 for a box of detergent, as Gary Duell puts it, they're conditioned to look for a 75¢ coupon.*

Procter and Gamble is the single largest redeemer of coupons for AFCOMS, says Duell, and most of them are used on items from the household cleaner category. Coupons play an equal role in sales and promotions for Army commissaries and for AAFES.

For the future, sales of household cleaners are expected to continue their slow, steady increase. Kline and Co. projects total sales for the category will reach $12.9 billion by 1989, staying three to four points ahead of inflation. The strongest contenders, according to Donovan, will continue to be vinyl cleaners and protectors, carpet deodorizers, air fresheners, and bathroom cleaners.

Meanwhile, new entries seem to be focusing on giving the consumer products that will help fill all of the requirements demanded of them. They'll save time by being more convenient or accomplishing more than one cleaning job. They'll take care of a highly specific task that isn't covered by the all-purpose cleaners. They'll be more pleasing, have a nicer scent, or be less abrasive. Most all the new entries will help save time because that's the number one requirement for many consumers today. Today's consumer truly understands the meaning of the old adage, "time is money," and shops accordingly.

The river seems idle past the banks, taking its time, waiting for no man, just looking ahead to the same placid future. But all the action's below the surface. That's where the water churns. And that's where the future's made. ■

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*See article on the subject of coupon redemption patterns elsewhere in this issue.

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# Coupon Report

## Coupon Distribution and Redemption Patterns By Product Group

Cents-off coupons are as popular today as they ever were, continuing to provide consumers a viable way of stretching an already scarce disposable food dollar. Among the most recent trends is an increase in the average face value of coupons. If you wondered just *how* manufacturers' coupons stack up, this article will provide most of your answers. *—The Editor*

The packaged goods purchase decision-making process has gone through a significant evolution over the past few years. With concerns over inflation and rising retail store prices, we have seen the development of a consumer who is continually struggling for ways to stretch the value of every dollar. Manufacturers have certainly tried to keep pace with this by offering direct incentives to improve the cost/value relationship apparent in their products.

An effective way to provide these incentives is cents-off coupons. Coupons offer the consumer a way to become directly involved in immediately reducing family expenses.

The growth in the number of coupons issued by manufacturers over recent years bears testimony to the fact that they recognize the growing need to maintain an optimum cost/value relationship in the eyes of the consumer *(Chart 1)*. In 1984, distributions of cents-off coupons totaled 163.2 billion. This represents an increase of 20.3 billion coupons, or 14% over the 142.9 billion circulated in 1983.

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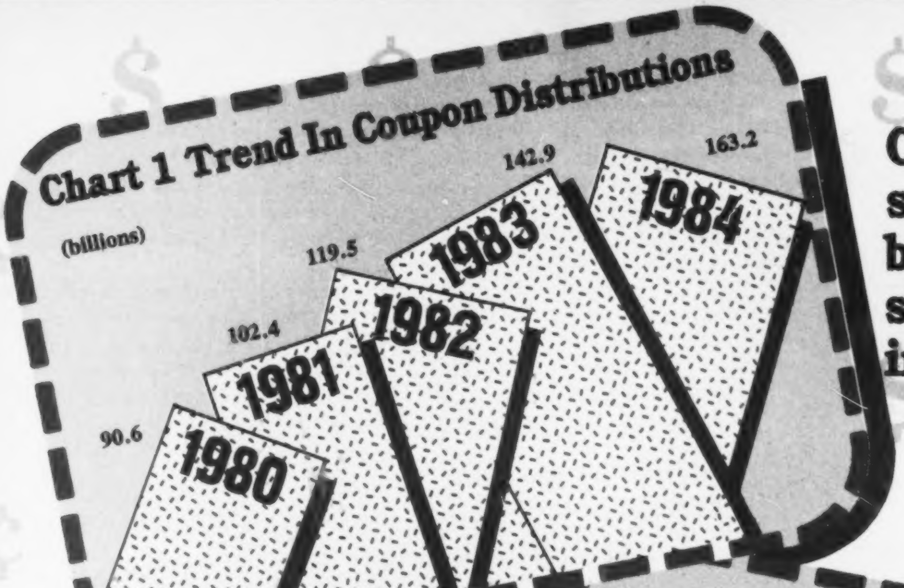
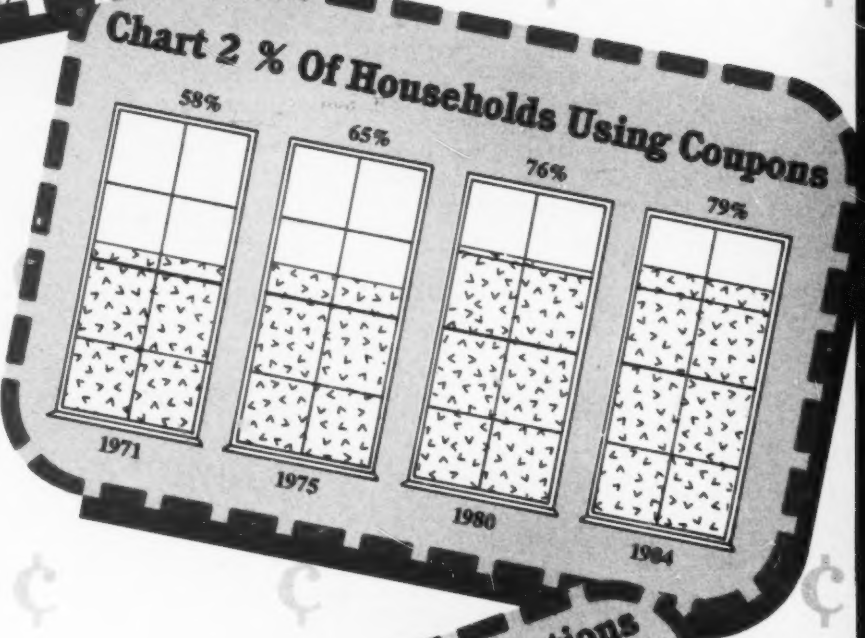
The Nielsen Clearing House data included in this article are based on estimates developed from available Nielsen and industry information and reports. The coupon distribution and redemption rates shown are based on NCH experience in processing and redeeming coupon promotions among many different product categories, but should not be regarded as absolute indicators of total distribution and redemption patterns for all coupons.



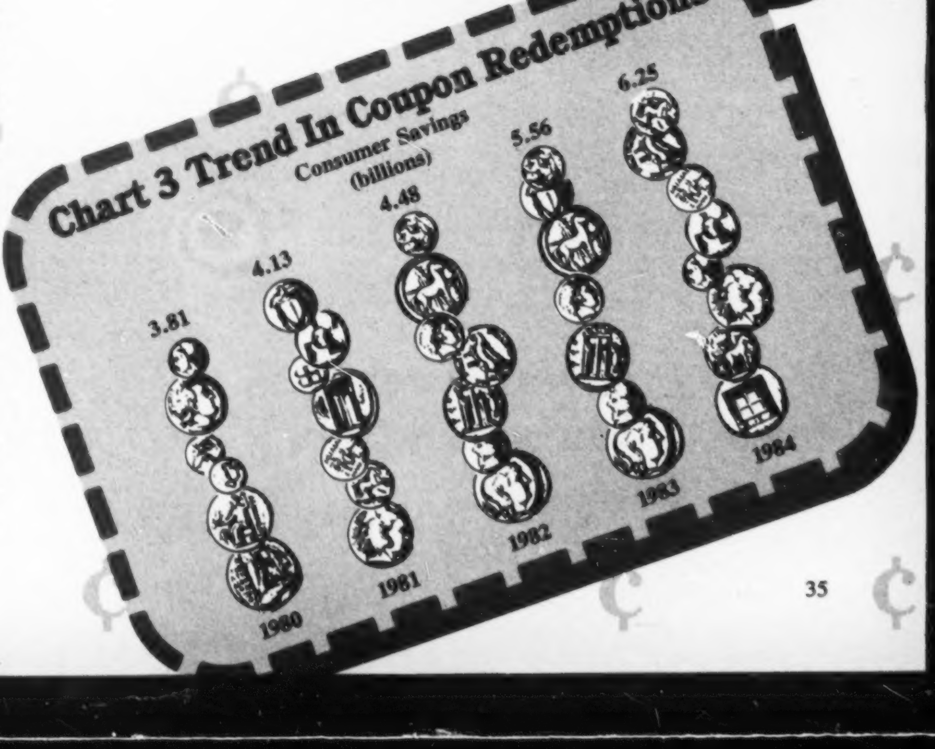
**Consumers saved $2.06 billion on their shopping bills in 1984.**



Consumer interest in and usage of coupons continues to broaden, and is a major factor in the growth of coupon distribution activity. *Chart 2* reflects the upward trend in percent of households using coupons, increasing from 58% in 1971 to 79% in 1984. Further underscoring the fact that more consumers are using coupons, a record 6.25 billion coupons were redeemed in 1984 *(Chart 3)*. Through their redemption of coupons, consumers saved $2.06 billion on their shopping bills in 1984.

Nielsen Clearing House (NCH) serves as the redemption agent for a large number of food, household, and health & beauty aid product manufacturers. This puts NCH in a unique position to evaluate and report how coupons are being used to promote different kinds of products.

Generally, coupon distribution and redemption patterns are analyzed in broad industry terms and presented in NCH's annual "Coupon Distribution and Redemption Patterns" report. In light of the magnitude of change going on within the couponing industry, it was recognized that the value of this annual report could be enhanced by extracting certain information for six separate product category groupings. After examining coupon promotions involving distributions of more than 80 billion coupons, we were able to compare and contrast coupon patterns established within each category. These patterns can then be used to reinforce marketers' knowledge about couponing as they relate to their own *unique product category*.



## Methods of Distribution

Many innovative vehicles and programs for distributing coupons are available to manufacturers. As a result, manufacturers can choose from any number of alternative ways to deliver their coupon programs – depending on individual needs and objectives.

When reviewing the division of coupon volumes among the principal distribution vehicles, we see a number of marked changes occurring. The most prominent changes involve the use of the Sunday free-standing insert and daily newspaper vehicles. Other vehicles have experienced only slight increases or decreases in usage *(Chart 4)*.

Reviewing the changes in vehicle selection across the various product groups reveals a number of similarities and differences. Note the change in structure of daily newspaper couponing.

Daily newspaper R.O.P. and co-op promotions have not only experienced declines in relative share of total distribution, they have experienced them across all product groups. Nevertheless, in 1984 these two vehicles accounted for 38% of the Meat and Dairy and Frozen Food coupons and 44% of the Beverage coupons. However, it is worth noting that in 1983, these two vehicles accounted for 42%, 49%, and 48% of their coupons, respectively.

A relatively new development in daily newspaper couponing has picked up some of the loss in share experienced by the R.O.P. and co-op vehicles. Free-standing inserts circulated via the daily newspaper accounted for 9% of total distributions in 1984. Manufacturers of Meat and Dairy and Frozen Food products placed heavier than average emphasis on this vehicle, increasing their distribution shares to 12% and 16% respectively.

The relative share of total distribution held by Sunday free-standing inserts made further substantial gains, reaching a level of 43% in 1984 versus 37% in 1983. This same rate of growth can be seen within each product group, with 1984 shares of distribution ranging from 28%–56%. Health and Beauty Aid, Household Product, and Other Packaged Food manufacturers are using free-standing inserts more frequently than any other circulation vehicle. For example, in 1984 Sunday free-standing inserts accounted for 56% of all Health and Beauty Aid coupons.

The newspaper co-op and magazine vehicles, despite experiencing minor decreases in relative share of total distribution between 1983 and 1984, still account for rather substantial shares of distribution within each category. Newspaper co-op promotions accounted for 6–12% of individual category 1984 distributions and 10 percent of all 1984 coupon distributions. The sharpest decreases in the use of this vehicle occurred within the Frozen Food, Meat and Dairy, and Other Packaged Food categories.

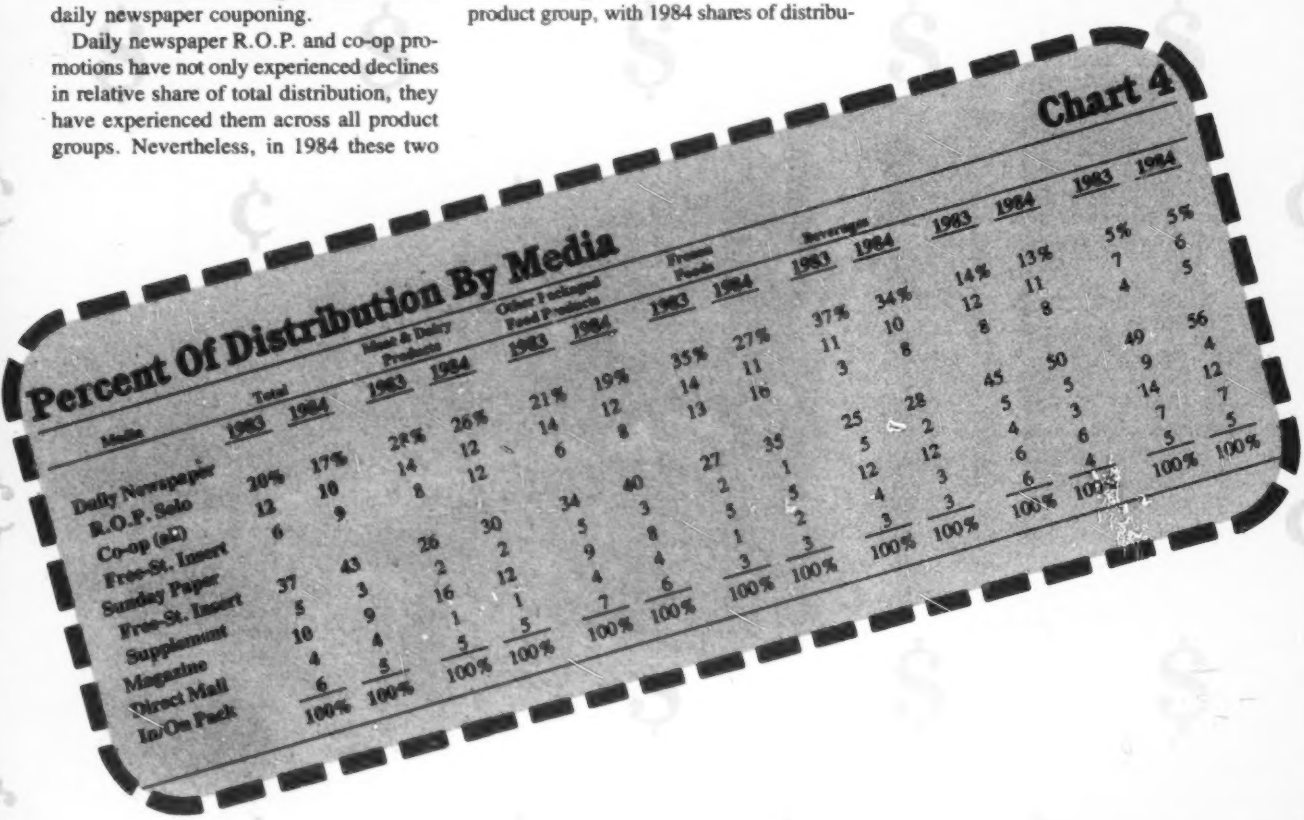


Chart 4

Percent Of Distribution By Media

| Media | Total 1983 | Total 1984 | Meat & Dairy Products 1983 | Meat & Dairy Products 1984 | Other Packaged Food Products 1983 | Other Packaged Food Products 1984 | Frozen Foods 1983 | Frozen Foods 1984 | Beverages 1983 | Beverages 1984 | 1983 | 1984 | 1983 | 1984 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Daily Newspaper | | | | | | | | | | | | | | |
| R.O.P. Solo | 20% | 17% | 28% | 26% | 21% | 19% | 35% | 27% | 37% | 34% | 14% | 13% | 5% | 5% |
| Co-op (all) | 12 | 10 | 14 | 12 | 14 | 12 | 14 | 11 | 11 | 10 | 12 | 11 | 7 | 6 |
| Free-St. Insert | 6 | 9 | 8 | 12 | 6 | 8 | 13 | 16 | 3 | 8 | 8 | 8 | 4 | 5 |
| Sunday Paper | | | | | | | | | | | | | | |
| Free-St. Insert | 37 | 43 | 26 | 30 | 34 | 40 | 27 | 35 | 25 | 28 | 45 | 50 | 49 | 56 |
| Supplement | 5 | 3 | 2 | 2 | 5 | 3 | 2 | 1 | 5 | 2 | 5 | 5 | 9 | 4 |
| Magazine | 10 | 9 | 16 | 12 | 9 | 8 | 5 | 5 | 12 | 12 | 4 | 3 | 14 | 12 |
| Direct Mail | 4 | 4 | 1 | 1 | 4 | 4 | 1 | 2 | 4 | 3 | 6 | 6 | 7 | 7 |
| In/On Pack | 6 | 5 | 5 | 5 | 7 | 6 | 3 | 3 | 3 | 3 | 6 | 4 | 5 | 5 |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |

**Many innovative vehicles for distributing coupons are available.**

Magazine promotions accounted for between 3% and 12% of individual category 1984 distributions and 9% of all 1984 coupon distributions. The sharpest decreases in use of this vehicle occurred within the Meat and Dairy and Health and Beauty Aid categories.

The Sunday supplement, direct mail, and in/on pack vehicles hold relatively small shares of category and overall industry distributions, but are regarded as effective vehicles for fulfilling certain promotional objectives. Sunday supplement promotions account for 1% to 5% of individual category distributions and 3% of all coupon distributions. Likewise, direct mail promotions account for 1% to 7% and 4%, with in/on pack promotions accounting for 3% to 6% and 5% of individual category and industry 1984 distributions, respectively.

## Coupon Redemption Rates

Current economic conditions, increased manufacturer usage, and growing consumer awareness and acceptance of coupons have contributed to changes in redemption ratios. *Chart 5* shows the 1984 average redemption rate, by medium, generated by the six product categories and the grocery industry. Note the differences in average response rates across the various product categories and how each compares to the grocery industry overall.

These differences can serve as useful guidelines for manufacturers when planning and budgeting promotional efforts. However, it is important to recognize that certain categories regularly redeem higher than others.

There certainly are basic differences between products and brands that contribute to the variations in response rates. Other factors causing variations in response rates include:

1. Method of coupon distribution.
2. Design and appeal of coupon offer.
3. Value of coupon offer.
4. Area of country.
5. Competitive activity and others.

In any case, it is important for manufacturers to recognize and consider all factors when projecting coupon redemption rates and promotional liabilities.

**Certain categories regularly redeem higher than others.**

In general, Meat and Dairy, Other Packaged Food, and Beverage coupon promotions redeem close to, or higher than, the grocery industry averages set by all manufacturers combined. For example, daily newspaper R.O.P. promotions, a popular selection for each of these categories, redeem well when compared to the industry average of 2.6%. Meat and Dairy R.O.P. coupons average a response rate of 2.5%, Other Packaged Food R.O.P. coupons 2.6%, and Beverage R.O.P. coupons 3.6%. Similar differences in response rates within these categories can be found when examining the averages for free-standing insert, newspaper co-op, and other vehicles.

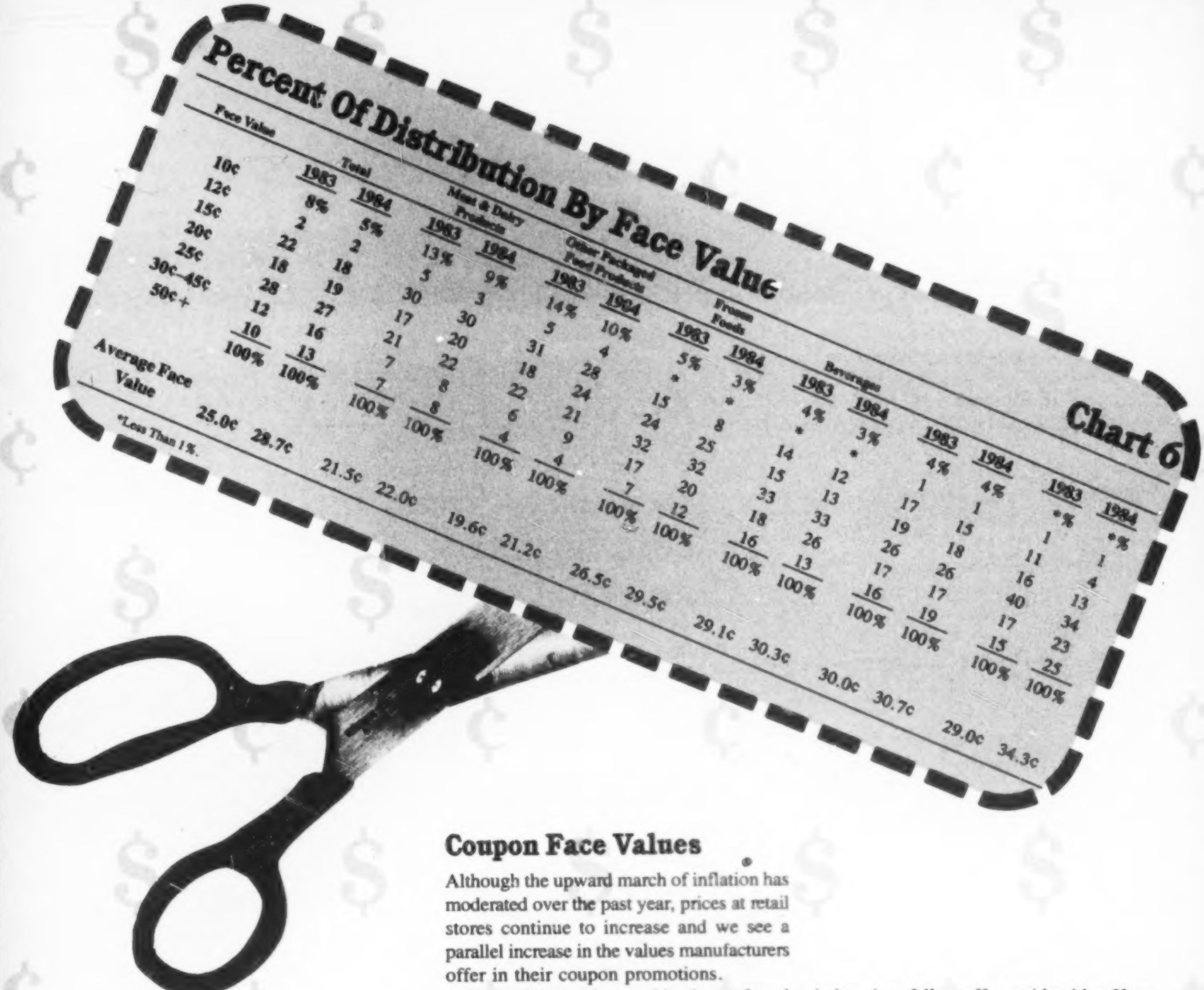
Average response rates for the Frozen Food, Household Product and Health and Beauty Aid categories generally fall below the averages established by the grocery industry. For instance, Sunday free-standing insert coupons for Frozen Foods average response rate is 3.6%, for Household Products 4.3%, and for Health and Beauty Aids 3.0%.

In all three cases, the averages fall below the grocery industry average of 4.5%. When reviewing the average response rates for the other media in these categories, you will find similar differences also exist.

### Average Redemption Rates By Media

**Chart 5**

| Media | Total | Meat & Dairy Products | Other Packaged Food Products | Frozen Foods | Beverages | Household Products | Health and Beauty Aids |
|---|---|---|---|---|---|---|---|
| Daily Newspaper | | | | | | | |
| R.O.P. Solo | 2.6% | 2.5% | 2.6% | 2.0% | 3.6% | 2.3% | 1.6% |
| Co-op (all) | 2.7 | 2.6 | 2.8 | 2.3 | 3.2 | 2.4 | 1.8 |
| Free-St. Insert | 4.2 | 4.0 | 4.3 | 3.6 | 4.8 | 4.0 | 2.5 |
| Sunday Paper | | | | | | | |
| Free-St. Insert | 4.5 | 4.4 | 4.6 | 3.6 | 5.0 | 4.3 | 3.0 |
| Supplement | 2.1 | 2.1 | 2.2 | 1.8 | 1.9 | 2.0 | 1.0 |
| Magazine | | | | | | | |
| On-Page | 2.0 | 2.1 | 2.1 | 1.8 | 2.0 | 1.7 | .9 |
| Pop-Up | 4.7 | 4.8 | 4.7 | 3.8 | 5.1 | 4.4 | 3.2 |
| Direct Mail | 8.1 | 7.9 | 8.3 | 7.0 | 8.9 | 7.8 | 7.0 |



# Percent Of Distribution By Face Value

Chart 6

| Face Value | Total 1983 | Total 1984 | Meat & Dairy Products 1983 | Meat & Dairy Products 1984 | Other Packaged Food Products 1983 | Other Packaged Food Products 1984 | Frozen Foods 1983 | Frozen Foods 1984 | Beverages 1983 | Beverages 1984 | 1983 | 1984 | 1983 | 1984 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 10¢ | 8% | 5% | 13% | 9% | 14% | 10% | 5% | 3% | 4% | 3% | 4% | 4% | *% | *% |
| 12¢ | 2 | 2 | 5 | 3 | 5 | 4 | * | * | * | * | 1 | 1 | 1 | 1 |
| 15¢ | 22 | 18 | 30 | 30 | 31 | 28 | 15 | 8 | 14 | 12 | 17 | 15 | 11 | 4 |
| 20¢ | 18 | 19 | 17 | 20 | 18 | 24 | 24 | 25 | 15 | 13 | 19 | 18 | 16 | 13 |
| 25¢ | 28 | 27 | 21 | 22 | 22 | 21 | 32 | 32 | 33 | 33 | 26 | 26 | 40 | 34 |
| 30¢–45¢ | 12 | 16 | 7 | 8 | 6 | 9 | 17 | 20 | 18 | 26 | 17 | 17 | 17 | 23 |
| 50¢+ | 10 | 13 | 7 | 8 | 4 | 4 | 7 | 12 | 16 | 13 | 16 | 19 | 15 | 25 |
|  | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Average Face Value | 25.0¢ | 28.7¢ | 21.5¢ | 22.0¢ | 19.6¢ | 21.2¢ | 26.5¢ | 29.5¢ | 29.1¢ | 30.3¢ | 30.0¢ | 30.7¢ | 29.0¢ | 34.3¢ |

*Less Than 1%.

## Coupon Face Values

Although the upward march of inflation has moderated over the past year, prices at retail stores continue to increase and we see a parallel increase in the values manufacturers offer in their coupon promotions.

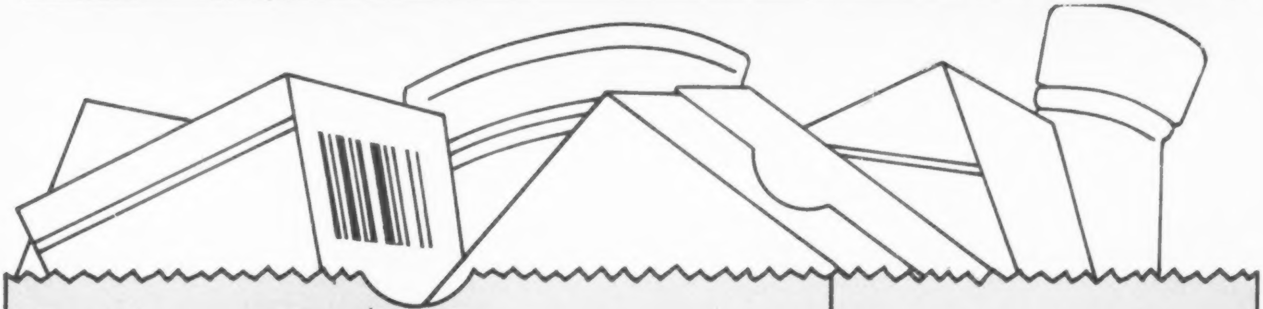
*Chart 6* shows the trend in share of total coupon distributions by face value. Note that despite the varying degrees to which face values are used within each product category, it is easy to recognize that the overriding trend over the past few years has been toward greater use of higher face values.

Reflecting this pattern, there has been a significant upward shift in the average face value for all product categories. In 1983, the average face values ranged from a low of 19.6¢ for the Other Packaged Food category to a high of 30.0¢ for the Household Product category. The 1984 average face values ranged from a low of 21.2¢ in the Other Packaged Food category to a high of 34.3¢ in Health and Beauty Aids.

In addition, Chart 6 reveals important differences in face value selection between each of the product categories. It is important to recognize that, across most product groups, the usage of face values of 15¢ and below has fallen off considerably. However, the 15¢ face value remains the third most popular selection for total coupon distributions and the most popular face value selection for Meat and Dairy and Other Packaged Food manufacturers.

In the Frozen Food, Beverage, Household Product, and Health and Beauty Aid categories, usage of coupon values of at least 25¢ continue to be quite popular. Health and Beauty Aid manufacturers use these values to circulate 82% of their coupons, with Beverage manufacturers using them to circulate 72%, Frozen Food manufacturers 64%, and Household Product manufacturers 62%. In each of these categories, the 25¢ face value continued to remain the most frequent selection, with usage ranging from 26% for Household Product coupons to 34% for Health and Beauty Aid coupons. However, the sharp increases in usage were generally noted at the higher face value levels of 30–45¢ and 50¢ or more. ■

**Usage of face values of 15¢ and below has fallen off considerably.**



# 5th Annual Commissary Sales Report

### BY ALAN GOLDSTEIN

It already has been widely reported that there were few bright spots in the fiscal 1985 commissary sales picture. The "big picture" showed a disappointing overall sales gain of just one-half percent – a real sales growth rate of .1 percent when adjusted for inflation – with both the Army and Air Force suffering near-equal declines of one percent and .9 percent respectively. In short, sales were flat.

There is no question that plummeting meat

*Alan Goldstein is the American Logistics Association's director of information and research. He is also editor of* Interservice *magazine.*

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## Commissary Store Census

This table provides a geographic breakdown of the number of military commissary stores in operation and reporting sales as of Sept. 30, 1985. Excluded are 39 Army (Troop Support Agency) grocery annexes which for reporting purposes are included in the official operating results of main stores.

| | Worldwide | CONUS | Overseas |
|---|---|---|---|
| *Total DoD* | *375* | *230* | *145* |
| Army (TSA) | 139 | 66 | 73 |
| Navy | 81 | 58 | 23 |
| Air Force (AFCOMS) | 140 | 93 | 47 |
| Marine Corps | 15 | 13 | 2 |

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sales were partly to blame for this apparent lackluster performance. On a worldwide basis, meat departments did 13.4 percent less business than in fiscal 1984. Only Marine stores turned in a marginal 1.1 percent worldwide sales gain.

The produce aisle also saw better days. On an all-service basis, overseas produce departments sold 4.7 percent fewer fruits and vegetables than in fiscal 1984. The decline was sharpest at Army's overseas stores, where the ring of the register was muffled to the tune of 10.4 percent.

The grocery category—mainstay of the entire store—was the one area where commissaries mustered sales gains on all fronts, with the sole exception of Army's overseas stores where grocery sales fell away 3.8 percent. On a worldwide basis for all commissaries, the department posted an encouraging gain of 3.5 percent.

The services are optimistic about improvements in fiscal 1986. BG James S. Hayes, Commander of the U.S. Army Troop Support Agency (TSA), recently stated, "Our goal is to increase sales by 5 percent during Fiscal year 1986 by providing even better quality—in products and service." He said TSA will "continue to seek for our customers more voluntary price reductions, special sales and promotional events, greater item selection and increased coupon benefits."

TSA's aggressive store replacement/renovation program now includes 60 projects. Eight are scheduled for completion in FY86, ground will be broken for another 11, and plans will be made for others.

The long-awaited deployment of the Army Commissary Automated System (ACAS) occurs this spring, which in turn should mean that scanning will be operational in 60 percent of CONUS stores by the end of this year. Scanning installation in Europe begins this September. ACAS also includes automated meat market management, bar coding for inventory and shelf replenishment and data interchange for ordering, receiving and payment.

Many of the improvements being planned by the Air Force Commissary Service (AFCOMS) come on the heels of initiatives begun last year, such as Sunday openings at several overcrowded stores. Fourteen stores, in CONUS and overseas, are now open Sundays. Another ten will be added in FY86. Other Air Force stores combined their operating schedules with nearby commissaries to enable shopping seven days a week.

Fresh fish markets and in-store bakeries were added to many stores, and more are on the way. In fact, last year's was the biggest single-year construction program for AFCOMS, with $97 million obligated to 21 new stores now under construction. Fifteen of those stores are due to open this year.

AFCOMS was also occupied with a reorganization of its 15 U.S. complexes into eight regions, redistributing 170 manpower slots to individual stores. This added store-level assistance is expected to increase efficiency and aid operations in the remaining six months of the current fiscal year—aid sorely needed in the wake of the budget-cutting Gramm-Rudman-Hollings Act. Adjustments already have cut about $5 million from the AFCOMS operation and maintenance (O&M) funds for the rest of FY86, forcing some shorter store hours and closings on U.S. and selected local holidays overseas.

Although the rate of sales increase has decelerated from the 11.6 percent growth spurt of FY84, according to a recent Navy report, most of the gains made by Navy commissaries in FY85 can be attributed to the continued success of NAVRESSO's Commissary Business Strategy (CBS). At the heart of the Navy's CBS are initiatives to improve customer service, increase merchandise assortments, and improve product availability.

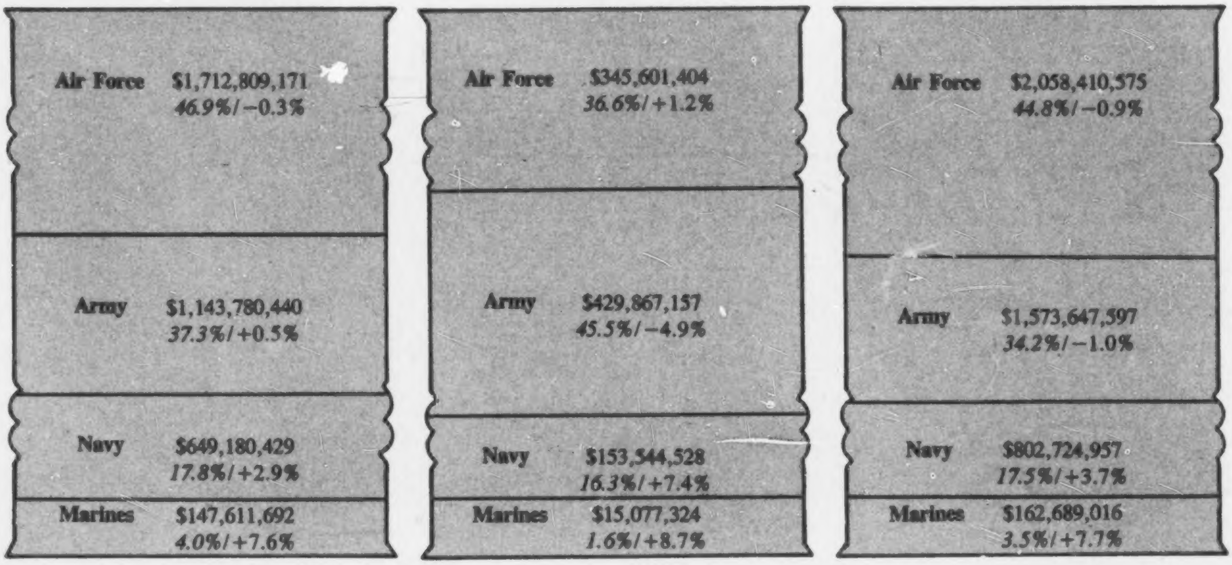
There are many challenges facing the commissary systems. But despite the difficulties and obstacles there is room for optimism.

This was the message of ALA President J. Brayton Fogerty at the recent ALA Commissary Roundtable in San Antonio, TX: "As an association, we are committed to lending every assistance that is helpful to those responsible for the commissaries. We ask a very simple thing of those colleagues. If we are going to have to live with the results of their surgery, let us become part of the diagnosis and a partner in the treatment."

Working together, the industry-military partnership will be exploring every means possible to make FY86 a banner year. ■

# All-Service Commissary Total Sales—FY85

| | CONUS | Overseas | Worldwide |
|---|---|---|---|
| **DoD Totals:** | $3,653,381,732 | $944,090,413 | $4,597,472,145 |
| **% of W/W Totals:** | 79.5% | 20.5% | 100.0% |
| **% Change vs. FY84:** | +0.8% | −0.7% | +0.5% |



**Note:** The percentage in italics represents the respective services' sales shares.

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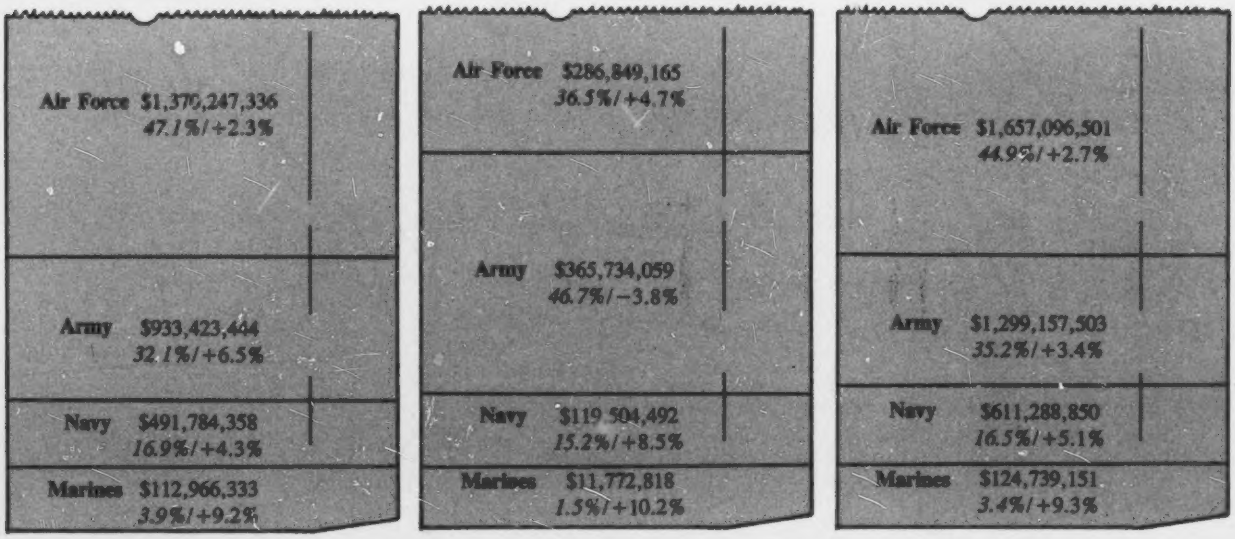
# All-Service Commissary Grocery Sales—FY85

| | CONUS | Overseas | Worldwide |
|---|---|---|---|
| **DoD Totals:** | $2,908,421,471 | $783,860,534 | $3,692,282,005 |
| **% of W/W Totals:** | 78.8% | 21.2% | 100.0% |
| **% Change vs. FY84:** | +4.2% | +1.1% | +3.5% |



**Note:** The percentage in italics represents the respective services' sales shares.

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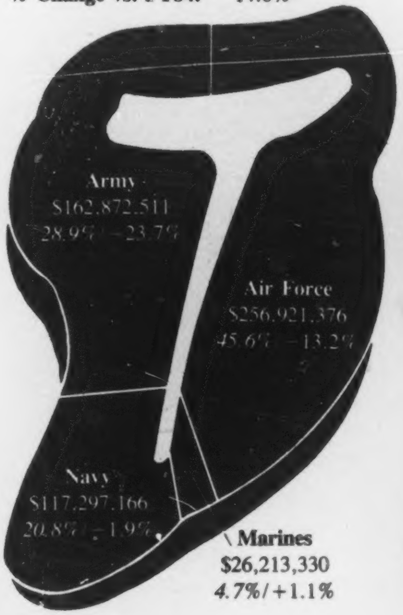
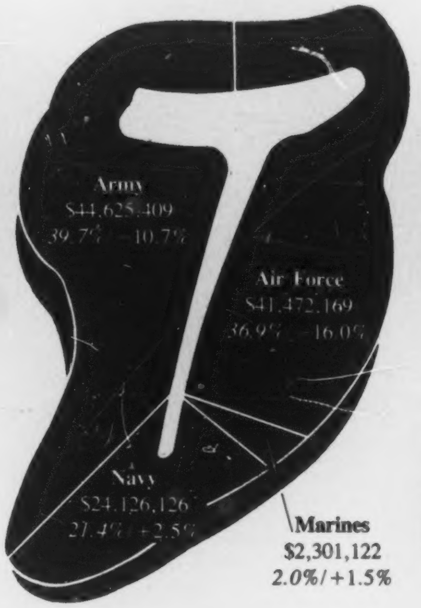
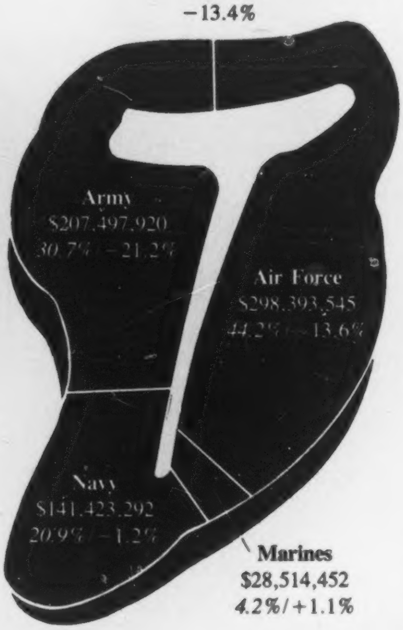
# All-Service Commissary Meat Sales—FY85

| | CONUS | Overseas | Worldwide |
|---|---|---|---|
| **DoD Totals:** | $563,304,383 | $112,524,826 | $675,829,209 |
| **% of W/W Totals:** | 83.4% | 16.6% | 100.0% |
| **% Change vs. FY84:** | −14.0% | −10.0% | −13.4% |



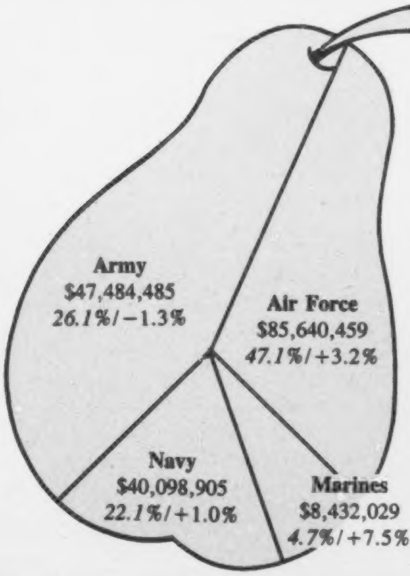


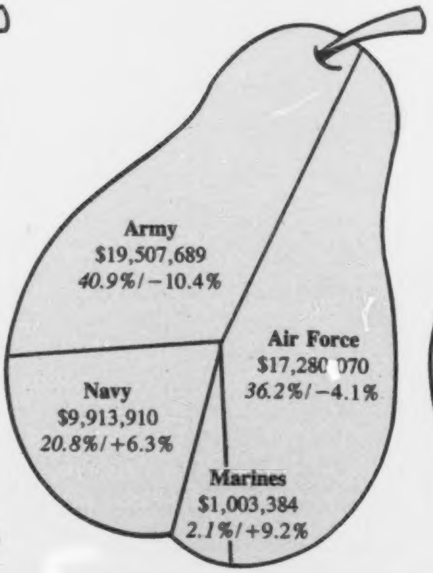


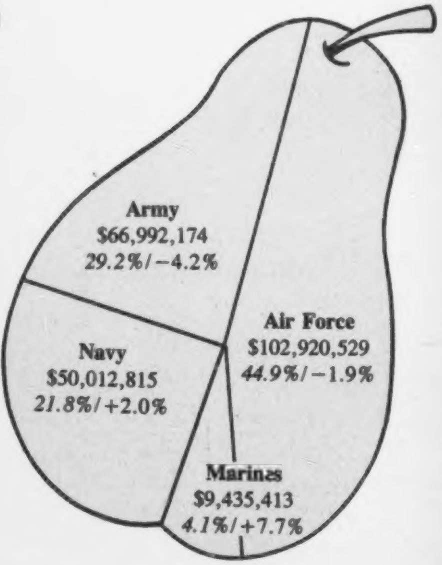
**Note:** The percentage in italics represents the respective services' sales shares.

# All-Service Commissary Produce Sales—FY85

| | CONUS | Overseas | Worldwide |
|---|---|---|---|
| **DoD Totals:** | $181,655,878 | $47,705,053 | $229,360,931 |
| **% of W/W Totals:** | 79.2% | 20.8% | 100.0% |
| **% Change vs. FY84:** | +1.5% | −4.7% | +0.3% |







**Note:** The percentage in italics represents the respective services' sales shares.

# All-Service Commissary Coupon Redemptions—FY85

## CONUS

| | Number | % Share CONUS | % Share Worldwide | $ Value | % Share CONUS | % Share Worldwide |
|---|---|---|---|---|---|---|
| Air Force | 76,353,075 | 48.2 | 46.1 | 24,425,363 | 48.7 | 46.9 |
| Army | 47,000,000 | 29.7 | 28.4 | 15,578,266 | 31.1 | 29.9 |
| Navy | 29,918,141 | 18.8 | 18.1 | 8,671,818 | 17.3 | 16.7 |
| Marine Corps | 5,151,760 | 3.3 | 3.1 | 1,462,559 | 2.9 | 2.8 |
| **CONUS Totals** | **158,422,976** | **100.0%** | **95.7%** | **$50,138,006** | **100.0%** | **96.3%** |

## Overseas

| | Number | % Share Overseas | % Share Worldwide | $ Value | % Share Overseas | % Share Worldwide |
|---|---|---|---|---|---|---|
| Air Force | 4,192,257 | 57.9 | 2.5 | 1,160,247 | 59.7 | 2.3 |
| Army | 2,300,000 | 31.8 | 1.3 | 593,849 | 30.6 | 1.1 |
| Navy | 480,114 | 6.6 | 0.3 | 114,399 | 5.9 | 0.2 |
| Marine Corps | 267,253 | 3.7 | 0.2 | 73,658 | 3.8 | 0.1 |
| **Overseas Totals** | **7,239,624** | **100.0%** | **4.3%** | **$1,942,153** | **100.0%** | **3.7%** |

## Worldwide

| | Number | | % Share Worldwide | $ Value | | % Share Worldwide |
|---|---|---|---|---|---|---|
| Air Force | 80,545,332 | – | 48.6 | 25,585,610 | – | 49.1 |
| Army | 49,300,000 | – | 29.8 | 16,172,115 | – | 31.1 |
| Navy | 30,398,255 | – | 18.3 | 8,786,217 | – | 16.9 |
| Marine Corps | 5,419,013 | – | 3.3 | 1,536,217 | – | 2.9 |
| **Worldwide Totals** | **165,662,600** | **–** | **100.0%** | **$52,080,159** | **–** | **100.0%** |

**Note:** Data may not reflect actual geographic distribution of coupon redemptions because official figures reported by region may include stores actually operating overseas but reported in CONUS, and vice-versa.

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# All-Service Commissary Surcharge Expense Distribution—FY85

| Total surcharge sales dollars | AFCOMS<br>$109,300,000 | TSA<br>$81,389,000 | Navy<br>$40,134,714 | Marine Corps<br>$8,067,260 |
|---|---|---|---|---|
| **% surcharge $ distributed to:** | | | | |
| Construction | 35.0 | 26.7 | 21.7 | 4.6 |
| Operating & office supplies | 20.0 | 17.1 | 17.4 | 18.3 |
| Utilities | 10.9 | 11.0 | 21.3 | 23.5 |
| Maintenance & services | 15.9 | 11.2 | 15.3 | 23.5 |
| Store Equipment & ADP | 18.2 | 42.5 | 24.3 | 8.2 |
| **Total** | **100.0**[1] | **108.5**[2] | **100.0** | **78.1**[3] |

**Notes:** Details may not add to 100 percent due to rounding. Expense from transportation, linens/uniforms and other like expense items is included in data for maintenance & services. Surcharge sales dollars exclude revenue from other sources (e.g., salvage and cardboard sales and cash discounts from suppliers).

[1] Actual construction expenses totaled $97.1 million; $38.2 million from current revenue and $58.9 million from a $60 million contract authority.

[2] The difference of 8.5 percent represents obligated surcharge funds carried forward to FY85 from FY84.

[3] The difference of 21.9 percent represents unobligated balance programs in FY86 carried forward for construction.

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# Commissary Sales Report

## All-Service Commissary Store Rankings by ACV . . . based on FY85 Sales

Overseas stores are shown in italics. ACVs for these stores represent their share of the total combined sales of all overseas commissaries. ACVs for CONUS stores represent their share of the total combined sales of all CONUS commissaries. Accordingly, two separate rankings, one for CONUS stores and one for overseas stores, are shown for all 375 worldwide commissaries.

Parent agency or branch of service for each commissary is shown to right of store name and location.

**AFCOMS**–Air Force Commissary Service
**NAVY**–Navy Resale System
**TSA**–U.S. Army Troop Support Agency
**USMC**–U.S. Marine Corps

Data are unadjusted for number of shopping days or other factors, and are based on official but preliminary sales reports.

/a Amount is less than .01 percent.

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| Rank | Store/Parent Organization | ACV |
|---|---|---|
| *1* | *Pearl Harbor, HI/Navy* | *5.63* |
| *2* | *Yongsan, Korea/TSA* | *3.76* |
| *3* | *Hickam AFB, HI/AFCOMS* | *3.21* |
| *4* | *Schofield Barracks, HI/TSA* | *3.14* |
| *5* | *Clark AB, PI/AFCOMS* | *2.96* |
| *6* | *Elmendorf AFB, AK/AFCOMS* | *2.80* |
| *7* | *Kadena AB, Okinawa/AFCOMS* | *2.38* |
| *8* | *Ft. Buchanan, PR/TSA* | *2.37* |
| *9* | *Ramstein AB, FRG/AFCOMS* | *2.19* |
| *10* | *Corozal, Panama/TSA* | *2.14* |
| *11* | *Osan AB, Korea/AFCOMS* | *1.97* |
| *12* | *Guam/Navy* | *1.97* |
| *13* | *Frankfurt, FRG/TSA* | *1.60* |
| *14* | *Andersen AFB, Guam/AFCOMS* | *1.53* |
| *15* | *Fuerth, FRG/TSA* | *1.52* |
| *16* | *Yokota AB, Japan/AFCOMS* | *1.46* |
| *17* | *Vogelweh, FRG/AFCOMS* | *1.45* |
| 1 | Ft. Belvoir, VA/TSA | 1.41 |
| 2 | Ft. Hood, TX/TSA | 1.41 |
| *18* | *RAF Lakenheath, UK/AFCOMS* | *1.41* |
| 3 | Ft. Bragg, NC/TSA | 1.39 |
| 4 | MacDill AFB, FL/AFCOMS | 1.39 |
| 5 | Ft. Bliss, TX/TSA | 1.38 |
| *19* | *Weisbaden FRG/TSA* | *1.37* |
| *20* | *Heidelberg, FRG/TSA* | *1.30* |
| *21* | *Kaneohe Bay, HI/USMC* | *1.30* |
| *22* | *Butler, Okinawa/AFCOMS* | *1.28* |
| 6 | Carswell AFB, TX/AFCOMS | 1.23 |
| 7 | Miramar, CA/Navy | 1.22 |
| 8 | McChord AFB, WA/AFCOMS | 1.20 |
| 9 | McGuire AFB, NJ/AFCOMS | $1.19 |
| *23* | *Subic Bay, PI/Navy* | *1.18* |
| 24 | Mannheim, FRG/TSA | 1.14 |
| 10 | Ft. Lewis, WA/TSA | 1.13 |
| 11 | Wright-Patterson AFB, OH/AFCOMS | 1.12 |
| 12 | Little Creek, VA/Navy | 1.08 |
| 13 | Ft. Benning, GA/TSA | 1.06 |
| 14 | Randolph AFB, TX/AFCOMS | 1.06 |
| *25* | *Giessen, FRG/TSA* | *1.05* |
| *26* | *Hanau, FRG/TSA* | *1.05* |
| *27* | *Berlin (Free Zone), FRG/TSA* | *1.03* |
| *28* | *Ft. Richardson, AK/TSA* | *1.02* |
| 15 | Barksdale AFB, LA/AFCOMS | 1.00 |
| 16 | Andrews AFB, MD/AFCOMS | 1.00 |
| 17 | Lackland AFB, TX/AFCOMS | 1.00 |
| *29* | *Rhein Main AB, FRG/AFCOMS* | *1.00* |
| 18 | San Diego NS, CA/Navy | 1.00 |
| 19 | Ft. Ord, CA/TSA | .98 |
| 20 | Langley AFB, VA/AFCOMS | .98 |
| 21 | Nellis AFB, NV/AFCOMS | .97 |
| 22 | Ft. Campbell, KY/TSA | .96 |
| *30* | *Bremerhaven, FRG/TSA* | *.96* |
| 23 | Tinker AFB, OK/AFCOMS | .94 |
| *31* | *Yokosuka, Japan/Navy* | *.94* |
| 24 | Ft. Sam Houston, TX/TSA | .93 |
| 25 | Lowry AFB, CO/AFCOMS | .92 |
| 26 | Patrick AFB, FL/AFCOMS | .90 |
| *32* | *Barbers Point, HI/Navy* | *.90* |
| 27 | Ft. Carson, CO/TSA | .89 |
| *33* | *RAF Upper Heyford, UK/AFCOMS* | *.89* |
| 28 | Ft. Knox, KY/TSA | .38 |
| 29 | Ft. Sill, OK/TSA | .88 |
| 30 | Bergstrom AFB, TX/AFCOMS | .88 |
| *34* | *Eielson AFB, AK/AFCOMS* | *.88* |
| 31 | Offutt AFB, NE/AFCOMS | .87 |
| *35* | *Misawa AB, Japan/AFCOMS* | *.87* |
| 32 | Cameron Station, VA/TSA | .86 |
| *36* | *Augsburg, FRG/TSA* | *.86* |
| 33 | Travis AFB, CA/AFCOMS | .85 |
| *37* | *Robinson Barracks, FRG/TSA* | *.85* |
| 34 | Eglin AFB, FL/AFCOMS | .84 |
| 35 | Ft. Meade, MD/TSA | .83 |
| 36 | Mather AFB, CA/AFCOMS | .83 |
| 37 | Davis-Monthan AFB, AZ/AFCOMS | .83 |
| 38 | Keesler AFB, MS/AFCOMS | .82 |
| *38* | *Bitburg AB, FRG/AFCOMS* | *.82* |
| *39* | *RAF Bentwaters, UK/AFCOMS* | *.82* |
| 39 | Little Rock AFB, AR/AFCOMS | .81 |
| 40 | Kirtland AFB, NM/AFCOMS | .81 |
| *40* | *Baumholder, FRG/TSA* | *.81* |
| *41* | *Roosevelt Roads, PR/Navy* | *.81* |
| *42* | *Hahn AB, FRG/AFCOMS* | *.80* |
| *43* | *Ft. Wainwright, AK/TSA* | *.80* |
| *45* | *Schweinfurt, FRG/TSA* | *.77* |
| 41 | Oceana, VA/Navy | .77 |
| 42 | Luke AFB, AZ/AFCOMS | .76 |
| *46* | *Naples, Italy/Navy* | *.75* |
| 43 | Jacksonville, FL/Navy | .74 |
| 44 | McClellan AFB, CA/AFCOMS | .73 |
| 45 | Moffett Field, CA/Navy | .73 |
| 46 | Ft. Gordon, GA/TSA | .72 |
| 47 | Charleston AFB, SC/AFCOMS | .71 |
| 48 | Peterson AFB, CO/AFCOMS | .71 |
| *47* | *Taegu, Korea/TSA* | *.71* |
| 49 | Norton AFB, CA/AFCOMS | .70 |
| 50 | Homestead AFB, FL/AFCOMS | .70 |

*Continued on page 59*

## All-Service Commissary Store Rankings by Average Monthly $ Sales/Square Foot . . . based on FY85 Sales

Overseas stores are shown in italics but are not ranked separately from CONUS stores.

Parent agency or branch of service for each commissary is shown to right of store name and location.

**AFCOMS**–Air Force Commissary Service
**NAVY**–Navy Resale System
**TSA**–U.S. Army Troop Support Agency
**USMC**–U.S. Marine Corps

Data are unadjusted for number of shopping days, and are based on official but preliminary sales reports.

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| Rank | Store/Parent Organization | Avg. Mo. Sales/SF |
|---|---|---|
| 1 | Ft. Lewis, WA/TSA | 208 |
| 2 | Oakland AB, CA/TSA | 201 |
| 3 | Ft. Jackson, SC/TSA | 183 |
| *4* | *Pearl Harbor, HI/Navy* | *180* |
| 5 | MacDill AFB, FL/AFCOMS | 168 |
| 6 | Ft. Ord, CA/TSA | 164 |
| 7 | Ft. Belvoir, VA/TSA | 163 |
| *8* | *Corozal, Panama/TSA* | *14*[illegible] |
| 9 | West Point, NY/TSA | 134 |
| *10* | *Subic Bay, PI/Navy* | *132* |
| 11 | Ft. Bliss, TX/TSA | 129 |
| 12 | Ft. Carson, CO/TSA | 123 |
| *13* | *Mainz, FRG/TSA* | *122* |
| 14 | Moffett Field, CA/Navy | 122 |
| *15* | *Pusan, Korea/TSA* | *119* |
| 16 | Fitzsimons AMC, CO/TSA | 118 |
| 17 | Ft. Hood, TX/TSA | 117 |
| *18* | *Hickam AFB, HI/AFCOMS* | *114* |
| 19 | Jacksonville, FL/Navy | 114 |
| 20 | Ft. Campbell, KY/TSA | 113 |
| 21 | Langley AFB, VA/AFCOMS | 112 |
| *22* | *Vicenza, Italy/TSA* | *112* |
| 23 | McChord AFB, WA/AFCOMS | 111 |
| 24 | Nellis AFB, NV/AFCOMS | 107 |
| 25 | Bergstrom AFB, TX/AFCOMS | 107 |
| 26 | Ft. Sam Houston, TX/TSA | 106 |
| 27 | Oakdale ASC, PA/TSA | 105 |
| 28 | Barksdale AFB, LA/AFCOMS | 105 |
| 29 | Eglin AFB, FL/AFCOMS | 105 |
| 30 | Andrews AFB, MD/AFCOMS | 105 |
| 31 | Ft. Ritchie, MD/TSA | 103 |
| *32* | *Ft. Buchanan, PR/TSA* | *103* |
| 33 | Seattle, WA/Navy | 102 |
| 34 | Homestead AFB, FL/AFCOMS | 101 |
| *35* | *Clark AB, PI/AFCOMS* | *101* |
| *36* | *Yongsan, Korea/TSA* | *101* |
| *37* | *Guam/Navy* | *101* |
| 38 | Ft. Bragg, NC/TSA | 100 |
| 39 | Davis-Monthan AFB, AZ/AFCOMS | 100 |
| 40 | Tinker AFB, OK/AFCOMS | 99 |
| *41* | *Patch Barracks, FRG/TSA* | *99* |
| 42 | Oceana, VA/Navy | 99 |

*Continued on page 100*

# Air Force Commissary Coupon Redemptions—FY85

| **CONUS** | Number | % Share CONUS | % Share Worldwide | $ Value | % Share CONUS | % Share Worldwide |
|---|---|---|---|---|---|---|
| California | 10,301,141 | 13.5 | 12.8 | 3,253,719 | 13.3 | 12.7 |
| Delta-Gulf | 9,389,811 | 12.3 | 11.7 | 3,093,817 | 12.7 | 12.1 |
| North Central | 10,383,010 | 13.6 | 12.9 | 3,211,579 | 13.1 | 12.6 |
| Northeast | 10,569,589 | 13.8 | 13.1 | 3,362,477 | 13.8 | 13.1 |
| Northwest | 5,039,836 | 6.6 | 6.3 | 1,569,398 | 6.4 | 6.1 |
| South Central | 11,938,506 | 15.6 | 14.8 | 3,972,227 | 16.3 | 15.5 |
| Southeast | 9,050,598 | 11.9 | 11.2 | 2,840,778 | 11.6 | 11.1 |
| Southwest | 9,680,584 | 12.7 | 12.0 | 3,121,367 | 12.8 | 12.2 |
| **CONUS Totals** | **76,353,075** | **100.0%** | **94.8%** | **$24,425,362** | **100.0%** | **95.5%** |

| **Overseas** | Number | % Share Overseas | % Share Worldwide | $ Value | % Share Overseas | % Share Worldwide |
|---|---|---|---|---|---|---|
| Alaska | 546,155 | 13.0 | .7 | 162,058 | 14.0 | .6 |
| *Andersen AFB, Guam* | 94,207 | 2.6 | .1 | 24,986 | 2.2 | .1 |
| *Ankara, Turkey* | 15,528 | .4 | N | 4,549 | .4 | N |
| *Aviano AB, Italy* | 20,790 | .5 | N | 5,689 | .5 | N |
| *Camp New Amsterdam, NL* | 37,146 | .9 | .1 | 9,237 | .8 | N |
| *Clark AB, PI* | 249,644 | 6.0 | .3 | 66,469 | 5.7 | .3 |
| Germany Complex | 838,846 | 20.0 | 1.0 | 216,530 | 18.7 | .9 |
| Greece Complex | 44,894 | 1.1 | .1 | 12,009 | 1.0 | .1 |
| *Hickam AFB, HI* | 865,872 | 20.7 | 1.9 | 261,171 | 22.5 | 1.0 |
| *Incirlik, Turkey* | 31,466 | .8 | N | 8,288 | .7 | N |
| *Izmir, Turkey* | 14,224 | .3 | N | 3,721 | .3 | N |
| *Lajes Field, Azores* | 39,106 | .9 | .1 | 10,873 | .9 | N |
| *Misawa, Japan* | 103,695 | 2.5 | .1 | 27,621 | 2.4 | .1 |
| Okinawa Complex | 489,943 | 11.7 | .6 | 131,138 | 11.3 | .5 |
| *Osan AB, Korea* | 97,991 | 2.3 | .1 | 33,217 | 2.9 | .1 |
| *San Vito, Italy* | 17,560 | .4 | N | 4,584 | .4 | N |
| Spain Complex | 82,129 | 2.0 | .1 | 21,030 | 1.8 | .1 |
| UK Complex | 442,427 | 10.6 | .6 | 113,999 | 9.8 | .5 |
| *Yokota AB, Japan* | 160,634 | 3.8 | .2 | 43,078 | 3.7 | .2 |
| **Overseas Totals** | **4,192,257** | **100.0%** | **5.2%** | **$1,160,247** | **100.0%** | **4.5%** |
| **Worldwide Totals** | **80,545,332** | | **100.0%** | **$25,585,609** | | **100.0%** |

**Note:** Overseas stand-alone stores are in italics. All other figures are for store complex areas. Details may not add to totals due to rounding. N = Not significant; less than one-tenth of one percent.

*Continued from page 54*

| Rank | Store/Parent Organization | ACV |
|---|---|---|
| 51 | March AFB, CA/AFCOMS | .69 |
| 52 | Scott AFB, IL/AFCOMS | .69 |
| *48* | *Wuerzburg, FRG/TSA* | *.67* |
| 53 | Walter Reed AMC, DC/TSA | .67 |
| *49* | *Kobbe/Howard, Panama/TSA* | *.67* |
| 54 | El Toro, CA/USMC | .66 |
| *50* | *Bamberg, FRG/TSA* | *.66* |
| 55 | Long Beach, CA/Navy | .64 |
| 56 | Ft. Jackson, SC/TSA | .62 |
| 57 | Quantico, VA/USMC | .62 |
| 58 | New London, CT/Navy | .62 |
| 59 | Ft. Gillem, GA/TSA | .61 |
| *51* | *Darmstadt, FRG/TSA* | *.61* |
| 60 | Redstone Arsenal, AL/TSA | .60 |
| 61 | Ft. Polk, LA/TSA | .59 |
| 62 | Fairchild AFB, WA/AFCOMS | .59 |

| Rank | Store/Parent Organization | ACV |
|---|---|---|
| 63 | Hill AFB, UT/AFCOMS | .59 |
| *52* | *RAF Alconbury, UK/ AFCOMS* | *.59* |
| *53* | *Sagamihara, Japan/TSA* | *.59* |
| 64 | Orlando, FL/Navy | .59 |
| 65 | Ft. Myer, VA/TSA | .58 |
| *54* | *Ansbach, FRG/TSA* | *.58* |
| *55* | *Karlsruhe, FRG/TSA* | *.58* |
| *56* | *Rota, Spain/Navy* | *.58* |
| 66 | Camp Pendleton, CA/USMC | .57 |
| *57* | *Chievres, Belgium/TSA* | *.57* |
| 67 | Pensacola, FL/Navy | .57 |
| 68 | Bolling AFB, DC/AFCOMS | .56 |
| *58* | *Patch Barracks, FRG/TSA* | *.56* |
| 69 | Tyndall AFB, FL/AFCOMS | .55 |
| 70 | Ft. Eustis, VA/TSA | .54 |

| Rank | Store/Parent Organization | ACV |
|---|---|---|
| 71 | Maxwell AFB, AL/AFCOMS | .54 |
| *59* | *Spangdahlem AB, FRG/ AFCOMS* | *.54* |
| 72 | Ft. Leavenworth, KS/TSA | .53 |
| 73 | Ft. Riley, KS/TSA | .53 |
| 74 | Hanscom AFB, MA/AFCOMS | .53 |
| 75 | Pease AFB, NH/AFCOMS | .53 |
| *60* | *Vicenza, Italy/TSA* | *.53* |
| *61* | *Guantanamo Bay, Cuba/Navy* | *.53* |
| 76 | Ft. Lee, VA/TSA | .52 |
| 77 | Presidio of San Francisco, CA/TSA | .51 |
| 78 | Sheppard AFB, TX/AFCOMS | .51 |
| *62* | *Incirlik, Turkey/AFCOMS* | *.51* |
| *63* | *Kitzingen, FRG/TSA* | *.51* |

*Continued on page 73*

# Air Force Commissary Sales—FY85

# CONUS

## California Region/AFCOMS

| Store | Store Class | Total Store $ Sales | % of Store Total Grocery | % of Store Total Meat | % of Store Total Produce | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| Beale AFB, CA | 6 | 13,940,165 | 78 | 19 | 3 | /a | 12,802 | 91 | .38 |
| Castle AFB, CA | 7 | 17,994,298 | 79 | 17 | 4 | /a | 22,760 | 66 | .49 |
| Edwards AFB, CA | 6 | 12,770,117 | 78 | 17 | 5 | +4.6 | 21,200 | 50 | .35 |
| George AFB, CA | 6 | 13,475,708 | 79 | 17 | 4 | +2.0 | 13,943 | 81 | .37 |
| Indian Springs Fld., NV | 1 | 474,537 | 84 | 13 | 3 | −4.1 | 1,721 | 23 | .01 |
| Los Angeles AFB, CA | 5 | 11,547,161 | 79 | 16 | 5 | +3.3 | 27,510 | 35 | .32 |
| March AFB, CA | 8 | 25,377,176 | 79 | 16 | 5 | +3.3 | 29,480 | 72 | .69 |
| Mather AFB, CA | 8 | 30,456,669 | 77 | 17 | 6 | −5.3 | 29,000 | 88 | .83 |
| McClellan AFB, CA | 7 | 26,813,122 | 78 | 17 | 5 | +11.1 | 35,000 | 64 | .73 |
| Nellis AFB, NV | 8 | 35,388,719 | 80 | 15 | 5 | +4.3 | 27,593 | 107 | .97 |
| Norton AFB, CA | 8 | 25,472,870 | 79 | 17 | 4 | /a | 23,758 | 89 | .70 |
| Travis AFB, CA | 8 | 31,093,490 | 77 | 18 | 5 | /a | 26,350 | 98 | .85 |
| Vandenberg AFB, CA | 6 | 17,851,454 | 79 | 16 | 5 | /a | 23,962 | 62 | .49 |
| **Region Totals** | | **$262,655,486** | **79%** | **16%** | **5%** | * | **295,079** | **$74** | **7.28%** |

## Delta-Gulf Region/AFCOMS

| Store | Store Class | Total Store $ Sales | % of Store Total Grocery | % of Store Total Meat | % of Store Total Produce | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| Arnold AFB, TN | 3 | 3,774,135 | 84 | 13 | 3 | −4.2 | 8,040 | 39 | .10 |
| Barksdale AFB, LA | 8 | 36,640,083 | 78 | 17 | 5 | −0.2 | 29,143 | 105 | 1.00 |
| Blytheville AFB, AR | 4 | 7,697,614 | 79 | 17 | 4 | −1.2 | 10,684 | 60 | .21 |
| Columbus AFB, MS | 5 | 10,456,418 | 79 | 17 | 4 | +0.4 | 16,500 | 53 | .29 |
| Eglin AFB, FL | 8 | 30,621,344 | 78 | 17 | 5 | −0.6 | 24,192 | 105 | .84 |
| England AFB, LA | 6 | 12,693,604 | 78 | 17 | 5 | −5.8 | 12,930 | 82 | .35 |
| Gunter AFB, AL | 6 | 12,195,144 | 78 | 18 | 4 | −7.4 | 16,160 | 63 | .33 |
| Hurlburt AFB, FL | 5 | 11,787,530 | 80 | 15 | 5 | −0.8 | 11,132 | 88 | .32 |
| Keesler AFB, MS | 8 | 30,001,527 | 78 | 17 | 5 | +0.1 | 30,689 | 81 | .82 |
| Little Rock AFB, AR | 8 | 29,416,308 | 78 | 17 | 5 | −3.1 | 28,616 | 86 | .81 |
| Maxwell AFB, AL | 7 | 19,545,637 | 78 | 16 | 6 | +6.0 | 29,400 | 55 | .54 |
| Moody AFB, GA | 5 | 10,745,191 | 78 | 17 | 5 | −0.2 | 16,808 | 53 | .29 |
| Robins AFB, GA | 7 | 18,244,373 | 80 | 16 | 4 | −2.0 | 26,522 | 57 | .50 |
| Tyndall AFB, FL | 7 | 20,258,904 | 77 | 18 | 5 | −0.9 | 29,385 | 57 | .55 |
| **Region Totals** | | **$254,077,812** | **79%** | **17%** | **4%** | * | **290,201** | **$73** | **6.95%** |

/a Less than 0.1%.

* Comparable data not available due to FY85 merger of 15 "Complex" management areas into 8 "Regions."

Store classes for Air Force commissaries are based upon total average monthly sales, as follows:

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Class 1 | Up to $100,000 | Class 3 | $300,001-$500,000 | Class 5 | $750,001-$1,000,000 | Class 7 | $1,500,001-$2,000,000 |
| Class 2 | $100,001-$300,000 | Class 4 | $500,001-$750,000 | Class 6 | $1,000,001-$1,500,000 | Class 8 | Over $2,000,000 |

**Notes:** All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY85 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data.

# Air Force Commissary Sales—FY85

## North Central Region/AFCOMS

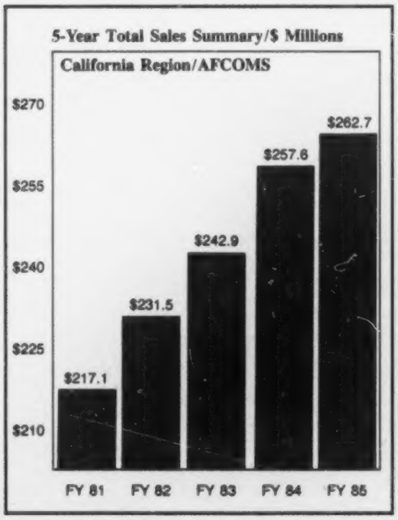
| Store | Store Class | Total Store $ Sales | % of Store Total Grocery | % of Store Total Meat | % of Store Total Produce | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| Calumet AFS, MI | 1 | 318,218 | 91 | 5 | 4 | −8.5 | 1,670 | 16 | .01 |
| Chanute AFB, IL | 6 | 13,463,503 | 78 | 16 | 6 | −1.2 | 24,690 | 45 | .37 |
| Ellsworth AFB, SD | 6 | 13,158,654 | 80 | 15 | 5 | /a | 17,358 | 63 | .36 |
| F.E. Warren AFB, WY | 5 | 10,494,201 | 79 | 16 | 5 | −0.2 | 13,963 | 63 | .29 |
| Grand Forks AFB, ND | 5 | 9,361,250 | 79 | 16 | 5 | +0.1 | 15,250 | 51 | .26 |
| Grissom AFB, IN | 4 | 8,734,684 | 80 | 16 | 4 | −0.1 | 19,833 | 37 | .24 |
| K.I. Sawyer AFB, MI | 5 | 8,794,224 | 77 | 18 | 5 | −2.5 | 17,428 | 42 | .24 |
| McConnell AFB, KS | 6 | 15,493,342 | 80 | 16 | 4 | −4.0 | 24,054 | 54 | .42 |
| Minot AFB, ND | 5 | 9,272,034 | 80 | 16 | 4 | +0.7 | 12,872 | 60 | .25 |
| Offutt AFB, NE | 8 | 31,674,158 | 80 | 16 | 4 | −6.8 | 32,205 | 82 | .87 |
| Port Austin AFS, MI | 1 | 296,567 | 88 | 10 | 2 | −5.1 | 1,490 | 17 | .01 |
| Scott AFB, IL | 8 | 25,312,377 | 77 | 18 | 5 | −1.3 | 24,000 | 88 | .69 |
| Whiteman AFB, MO | 5 | 10,112,769 | 81 | 15 | 4 | −3.9 | 18,313 | 46 | .28 |
| Wright-Patterson AFB, OH | 8 | 40,849,006 | 79 | 16 | 5 | −1.3 | 39,750 | 86 | 1.12 |
| Wurtsmith AFB, MI | 4 | 8,024,571 | 80 | 17 | 3 | /a | 17,133 | 39 | .22 |
| **Region Totals** | | **$205,359,558** | **81%** | **15%** | **4%** | • | **280,009** | **$61** | **5.62%** |

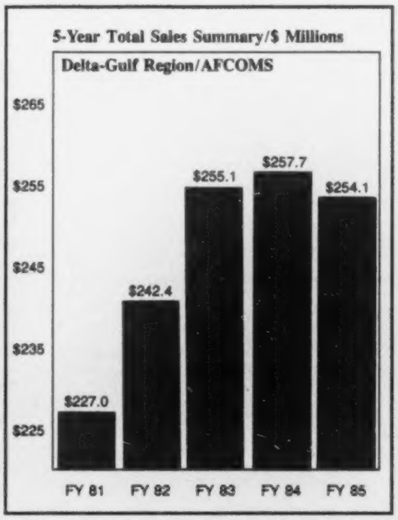
**/a** Less than 0.1%.
**/b** Comparison with prior year's data not meaningful.
**/c** New store opened 4th qtr FY85.
**/d** Transferred from TSA to AFCOMS in FY85.
**N.A.** Totals not meaningful for comparison purposes.
• Comparable data not available due to FY85 merger of 15 "Complex" management areas into 8 "Regions."

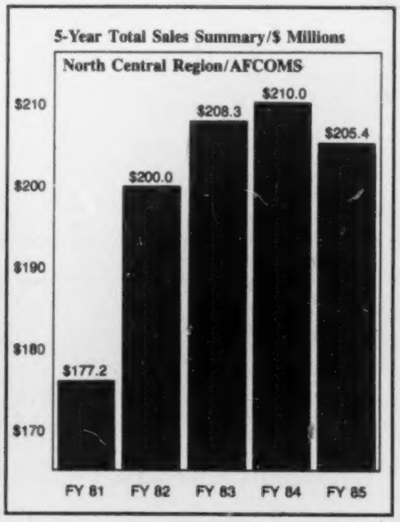
Store classes for Air Force commissaries are based upon total average monthly sales, as follows:

| | |
|---|---|
| Class 1 | Up to $100,000 |
| Class 2 | $100,001-$300,000 |
| Class 3 | $300,001-$500,000 |
| Class 4 | $500,001-$750,000 |
| Class 5 | $750,001-$1,000,000 |
| Class 6 | $1,000,001-$1,500,000 |
| Class 7 | $1,500,001-$2,000,000 |
| Class 8 | Over $2,000,000 |

**Notes:** All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY85 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data.


**5-Year Total Sales Summary/$ Millions**


**5-Year Total Sales Summary/$ Millions**


**5-Year Total Sales Summary/$ Millions**

# Air Force Commissary Sales—FY85

**It's A Fact!**

Can you name the military commissary that last year posted the highest figure for average monthly sales per square feet of selling space? The answer: Army's Ft. Lewis, WA, commissary reported a figure of $208.

## Northeast Region/AFCOMS

| Store | Store Class | Total Store $ Sales | % of Store Total: Grocery | % of Store Total: Meat | % of Store Total: Produce | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| Andrews AFB, MD | 8 | 36,368,128 | 78 | 17 | 5 | −1.9 | 28,827 | 105 | 1.00 |
| Bolling AFB, DC | 7 | 20,543,008 | 76 | 18 | 6 | +4.2 | 23,808 | 72 | .56 |
| Dover AFB, DE | 7 | 17,860,246 | 79 | 17 | 4 | −1.0 | 24,554 | 61 | .49 |
| Griffiss AFB, NY | 6 | 15,312,248 | 80 | 15 | 5 | +8.3 | 17,000 | 75 | .42 |
| Hanscom AFB, MA | 7 | 19,275,400 | 79 | 16 | 5 | −0.1 | 31,125 | 52 | .53 |
| Langley AFB, VA | 8 | 35,794,310 | 77 | 17 | 6 | −1.0 | 26,532 | 112 | .98 |
| Loring AFB, ME | 4 | 8,052,957 | 81 | 14 | 5 | +5.1 | 12,404 | 54 | .22 |
| McGuire AFB, NJ | 8 | 43,460,802 | 79 | 16 | 5 | −2.8 | 39,444 | 92 | 1.19 |
| North Truro AFS, MA | 1 | 421,984 | 89 | 8 | 3 | −30.7 | 2,540 | 14 | .01 |
| Pease AFB, NH | 7 | 19,248,807 | 82 | 14 | 4 | /a | 25,506 | 63 | .53 |
| Plattsburgh AFB, NY | 5 | 10,593,866 | 81 | 14 | 5 | +2.7 | 19,993 | 44 | .29 |
| **Region Totals** | | **$226,931,756** | **80%** | **15%** | **5%** | ***** | **251,733** | **$75** | **6.21%** |

## Northwest Region/AFCOMS

| Store | Store Class | Total Store $ Sales | % of Store Total: Grocery | % of Store Total: Meat | % of Store Total: Produce | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| Fairchild AFB, WA | 7 | 21,376,372 | 81 | 14 | 5 | −1.8 | 19,311 | 92 | .59 |
| Hill AFB, UT | 7 | 21,431,374 | 79 | 15 | 6 | −1.7 | 24,352 | 73 | .59 |
| Makah AFS, WA | 1 | 315,288 | 83 | 13 | 4 | +3.8 | 1,478 | 18 | .01 |
| Malmstrom AFB, MT | 5 | 11,579,314 | 80 | 15 | 5 | +0.1 | 17,000 | 57 | .32 |
| McChord AFB, WA | 8 | 43,932,557 | 78 | 17 | 5 | −5.4 | 32,979 | 111 | 1.20 |
| Mt. Home AFB, ID | 5 | 11,779,256 | 79 | 16 | 5 | −0.1 | 15,094 | 65 | .32 |
| **Region Totals** | | **$110,414,161** | **80%** | **15%** | **5%** | ***** | **110,214** | **$83** | **3.02%** |

/a Less than 0.1%.
/b Comparison with prior year's data not meaningful.
/c New store opened 4th qtr FY85.
/d Transferred from TSA to AFCOMS in FY85.
N.A. Totals not meaningful for comparison purposes.
* Comparable data not available due to FY85 merger of 15 "Complex" management areas into 8 "Regions."

Store classes for Air Force commissaries are based upon total average monthly sales, as follows:

| | | | |
|---|---|---|---|
| Class 1 Up to $100,000 | Class 3 $300,001-$500,000 | Class 5 $750,001-$1,000,000 | Class 7 $1,500,001-$2,000,000 |
| Class 2 $100,001-$300,000 | Class 4 $500,001-$750,000 | Class 6 $1,000,001-$1,500,000 | Class 8 Over $2,000,000 |

**Notes:** All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY85 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data.

# Air Force Commissary Sales—FY85

## South Central Region/AFCOMS

| Store | Store Class | Total Store $ Sales | % of Store Total: Grocery | % of Store Total: Meat | % of Store Total: Produce | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| Altus AFB, OK | 5 | 9,180,957 | 80 | 15 | 5 | −0.1 | 9,952 | 77 | .25 |
| Bergstrom AFB, TX | 8 | 32,327,781 | 77 | 18 | 5 | /a | 25,196 | 107 | .88 |
| Brooks AFB, TX | 4 | 6,882,727 | 80 | 16 | 4 | −2.4 | 9,240 | 62 | .19 |
| Carswell AFB, TX | 8 | 44,773,469 | 80 | 17 | 3 | +4.7 | 50,000 | 75 | 1.23 |
| Dyess AFB, TX | 6 | 15,410,450 | 78 | 17 | 5 | −1.7 | 18,000 | 71 | .42 |
| Goodfellow AFB, TX | 4 | 7,772,168 | 81 | 15 | 4 | −4.7 | 11,440 | 57 | .21 |
| Kelly AFB, TX | 5 | 9,941,799 | 78 | 18 | 4 | −1.5 | 15,710 | 53 | .27 |
| Lackland AFB, TX | 8 | 36,492,706 | 77 | 18 | 5 | +3.4 | 43,870 | 69 | 1.00 |
| Laughlin AFB, TX | 3 | 5,179,706 | 79 | 16 | 5 | −3.9 | 12,220 | 35 | .14 |
| Randolph AFB, TX | 8 | 38,832,296 | 76 | 18 | 6 | +1.8 | 33,628 | 96 | 1.06 |
| Sheppard AFB, TX | 7 | 18,629,706 | 77 | 17 | 6 | /a | 25,000 | 62 | .51 |
| Tinker AFB, TX | 8 | 34,524,131 | 80 | 16 | 4 | −4.8 | 29,000 | 99 | .94 |
| Vance AFB, OK | 3 | 4,836,480 | 78 | 17 | 5 | −3.5 | 9,570 | 42 | .13 |
| **Region Totals** | | **$264,784,247** | **78%** | **17%** | **6%** | ***** | **292,826** | **$75** | **7.25%** |

/a Less than 0.1%.
/b Comparison with prior year's data not meaningful.
/c New store opened 4th qtr FY85.
/d Transferred from TSA to AFCOMS in FY85.
N.A. Totals not meaningful for comparison purposes.
* Comparable data not available due to FY85 merger of 15 "Complex" management areas into 8 "Regions."

Store classes for Air Force commissaries are based upon total average monthly sales, as follows:

Class 1 Up to $100,000
Class 2 $100,001–$300,000
Class 3 $300,001–$500,000
Class 4 $500,001–$750,000
Class 5 $750,001–$1,000,000
Class 6 $1,000,001–$1,500,000
Class 7 $1,500,001–$2,000,000
Class 8 Over $2,000,000

**Notes:** All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY85 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data.

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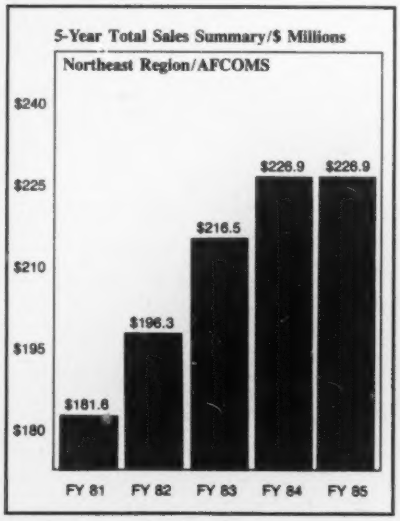
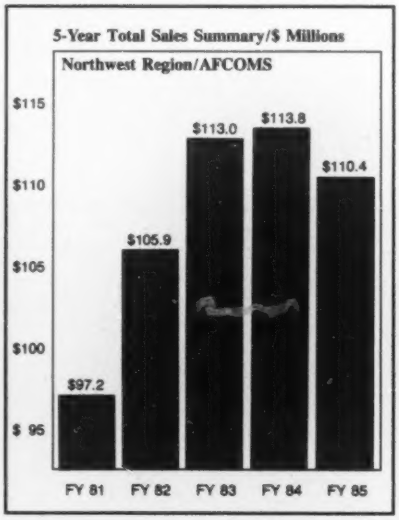
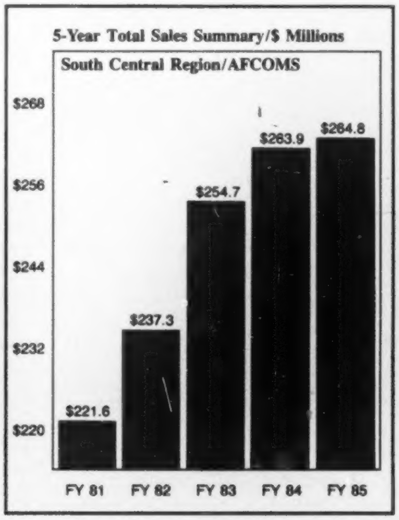

**5-Year Total Sales Summary/$ Millions**

**Northeast Region/AFCOMS**


**5-Year Total Sales Summary/$ Millions**

**Northwest Region/AFCOMS**


**5-Year Total Sales Summary/$ Millions**

**South Central Region/AFCOMS**

# Air Force Commissary Sales—FY85

## Southeast Region/AFCOMS

| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| Avon Park Range, FL | 1 | 981,424 | 83 | 15 | 2 | +75.5 | 3,012 | 27 | .03 |
| Charleston AFB, SC | 8 | 25,781,394 | 78 | 18 | 4 | −3.7 | 26,000 | 83 | .71 |
| Fort Fisher AFS, NC | 1 | 729,039 | 89 | 10 | 1 | −5.7 | 3,120 | 19 | .02 |
| Homestead AFB, FL | 8 | 25,513,331 | 78 | 18 | 4 | −3.1 | 20,962 | 101 | .70 |
| MacDill AFB, FL | 8 | 50,879,283 | 80 | 16 | 4 | −4.1 | 25,280 | 168 | 1.39 |
| Myrtle Beach AFB, SC | 5 | 10,470,232 | 78 | 18 | 4 | +0.1 | 11,272 | 77 | .29 |
| Patrick AFB, FL | 8 | 32,827,733 | 78 | 17 | 5 | +1.4 | 28,137 | 97 | .90 |
| Seymour Johnson AFB, NC | 6 | 15,213,108 | 78 | 18 | 4 | −0.9 | 17,035 | 74 | .42 |
| Shaw AFB, SC | 6 | 15,791,472 | 78 | 18 | 4 | +4.1 | 15,000 | 88 | .43 |
| **Region Totals** | | **$178,187,016** | **80%** | **16%** | **4%** | **•** | **149,818** | **$99** | **4.88%** |

## Southwest Region/AFCOMS

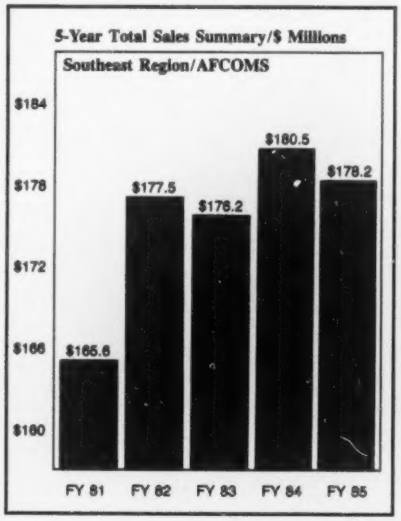
| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| Cannon AFB, NM | 4 | 8,263,226 | 79 | 16 | 5 | − 4.3 | 18,240 | 38 | .23 |
| Davis-Monthan AFB, AZ | 8 | 30,456,297 | 78 | 16 | 6 | /a | 25,400 | 100 | .83 |
| Gila Bend AF Aux. Fld., AZ | 1 | 383,246 | 83 | 13 | 4 | +13.5 | 2,663 | 12 | .01 |
| Holbrook AFB, AZ | 1 | 175,774 | 87 | 12 | 1 | +12.3 | 592 | 25 | /a |
| Holloman AFB, NM | 6 | 12,814,658 | 80 | 15 | 5 | +4.7 | 23,427 | 46 | .35 |
| Kirtland AFB, NM | 8 | 29,631,375 | 81 | 15 | 4 | −1.3 | 26,638 | 93 | .81 |
| Lowry AFB, CO | 8 | 33,693,434 | 77 | 18 | 5 | /a | 35,413 | 79 | .92 |
| Luke AFB, AZ | 8 | 27,688,245 | 80 | 16 | 4 | +2.1 | 25,100 | 92 | .76 |
| Peterson AFB, CO | 8 | 26,107,131 | 78 | 17 | 5 | +3.1 | 23,144 | 94 | .71 |
| Reese AFB, TX | 4 | 7,568,951 | 79 | 16 | 5 | −1.3 | 16,208 | 39 | .21 |
| USAF Academy, CO | 6 | 16,220,064 | 77 | 16 | 7 | +0.1 | 16,238 | 83 | .44 |
| Williams AFB, AZ | 6 | 17,396,734 | 80 | 16 | 4 | +5.4 | 21,986 | 66 | .48 |
| **Region Totals** | | **$210,399,135** | **80%** | **15%** | **5%** | **•** | **235,049** | **$75** | **5.76%** |
| **CONUS Totals** | | **$1,712,809,171** | **80%** | **15%** | **5%** | **−0.3%** | **1,904,929** | **$75** | **46.88%** |

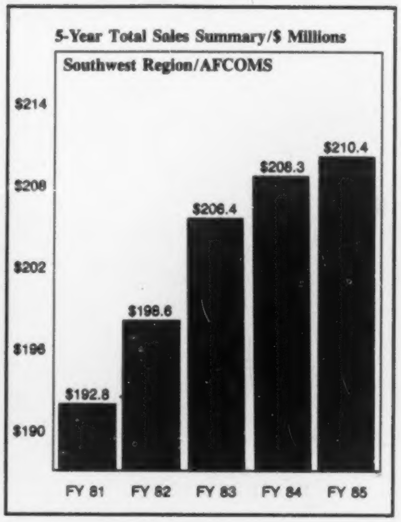
/a Less than 0.1%.
/b Comparison with prior year's data not meaningful.
/c New store opened 4th qtr FY85.
/d Transferred from TSA to AFCOMS in FY85.
N.A. Totals not meaningful for comparison purposes.
• Comparable data not available due to FY85 merger of 15 "Complex" management areas into 8 "Regions."

Store classes for Air Force commissaries are based upon total average monthly sales, as follows:
Class 1 Up to $100,000
Class 2 $100,001-$300,000
Class 3 $300,001-$500,000
Class 4 $500,001-$750,000
Class 5 $750,001-$1,000,000
Class 6 $1,000,001-$1,500,000
Class 7 $1,500,001-$2,000,000
Class 8 Over $2,000,000

**Notes:** All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY85 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data.

# Air Force Commissary Sales—FY85





## It's A Fact!

Do you know which are the 25 CONUS military commissaries reporting the highest FY85 total store sales? They are:

1. Ft. Bliss, TX *($50,234,415)*
2. Ft. Belvoir, VA *($51,682,254)*
3. Ft. Hood, TX *($51,389,189)*
4. MacDill AFB, FL *($50,879,283)*
5. Ft. Bragg, NC *($50,784,798)*
6. Carswell AFB, TX *($44,773,469)*
7. Miramar, CA *($44,618,312)*
8. McChord AFB, WA *($43,932,557)*
9. McGuire AFB, NJ *($43,460,802)*
10. Ft. Lewis, WA *($41,444,948)*
11. Wright-Patterson AFB, OH *($40,849,006)*
12. Little Creek, VA *($39,615,459)*
13. Randolph AFB, TX *($38,832,296)*
14. Ft. Benning, GA *($38,556,256)*
15. Barksdale AFB, LA *($36,640,083)*
16. San Diego NS, CA *($36,553,792)*
17. Lackland AFB, TX *($36,492,577)*
18. Andrews AFB, MD *($36,368,128)*
19. Ft. Ord, CA *($35,797,888)*
20. Langley AFB, VA *($35,794,310)*
21. Nellis AFB, NV *($35,388,719)*
22. Ft. Campbell, KY *($34,999,036)*
23. Tinker AFB, OK *($34,524,131)*
24. Ft. Sam Houston, TX *($34,090,259)*
25. Patrick AFB, FL *($32,827,733)*

*Continued from page 59*

| Rank | Store/Parent Organization | ACV |
|---|---|---|
| *64* | *Munich, FRG/TSA* | *.51* |
| 79 | Ft. Rucker, AL/TSA | .50 |
| 80 | Ft. Leonard Wood, MO/TSA | .50 |
| 81 | Robins AFB, GA/AFCOMS | .50 |
| *65* | *Zweibruecken, FRG/TSA* | *.50* |
| 82 | Ft. Monmouth, NJ/TSA | .49 |
| 83 | Castle AFB, CA/AFCOMS | .49 |
| 84 | Vandenberg AFB, CA/ AFCOMS | .49 |
| 85 | Dover AFB, DE/AFCOMS | .49 |
| *66* | *Aschaffenburg, FRG/TSA* | *.49* |
| 86 | Williams AFB, AZ/AFCOMS | .48 |
| *67* | *Grafenwoehr, FRG/TSA* | *.48* |
| *68* | *Sembach AB, FRG/AFCOMS* | *.47* |
| *69* | *Kinser, Okinawa/AFCOMS* | *.47* |
| 87 | Norfolk, VA/Navy | .47 |
| 88 | Alameda, CA/Navy | .47 |
| *70* | *Lajes Field, Azores/AFCOMS* | *.46* |
| *71* | *Mainz, FRG/TSA* | *.46* |
| *72* | *Pirmasens, FRG/TSA* | *.46* |
| 89 | Ft. Ben Harrison, IN/TSA | .45 |
| 90 | Cherry Point, NC/USMC | .45 |
| 91 | Ft. Huachuca, AZ/TSA | .45 |
| *73* | *Heilbronn, FRG/TSA* | *.45* |
| 92 | Seattle, WA/Navy | .45 |
| 93 | Memphis, TN/Navy | .45 |
| 94 | Ft. Devens, MA/TSA | .44 |
| 95 | USAF Academy, CO/ AFCOMS | .44 |
| *74* | *Bad Kreuznach, FRG/TSA* | *.44* |
| *75* | *Holy Loch, Scotland/Navy* | *.44* |
| 96 | Ft. McClellan, AL/TSA | .43 |
| 97 | Ft. Stewart, GA/TSA | .43 |
| 98 | Shaw AFB, SC/AFCOMS | .43 |
| *76* | *Schinnen, NL/TSA* | *.43* |
| 99 | Granite City AD, IL/TSA | .42 |
| 100 | Griffiss AFB, NY/AFCOMS | .42 |
| 101 | Dyess AFB, TX/AFCOMS | .42 |
| 102 | Seymour Johnson AFB, NC/ AFCOMS | .42 |
| 103 | McConnell AFB, KS/AFCOMS | .42 |
| *77* | *Bermuda/Navy* | *.42* |
| 104 | Great Lakes, IN/Navy | .41 |
| 105 | North Island, CA/Navy | .40 |
| *78* | *Adak, AK/Navy* | *.40* |
| *79* | *Keflavik, Iceland/Navy* | *.40* |
| 106 | Tarawa Terrace, NC/USMC | .39 |
| *80* | *Fulda, FRG/TSA* | *.39* |
| 107 | Beale AFB, CA/AFCOMS | .38 |
| *81* | *Makiminato, Okinawa/ AFCOMS* | *.38* |
| *82* | *Neu Ulm, FRG/TSA* | *.38* |
| 108 | Port Hueneme, CA/Navy | .38 |
| 109 | George AFB, CA/AFCOMS | .37 |
| 110 | Chanute AFB, IL/AFCOMS | .37 |
| *83* | *Gelnhausen, FRG/TSA* | *.37* |
| 111 | Hadnot Point, NC/USMC | .36 |
| 112 | Ellsworth AFB, SD/AFCOMS | .36 |
| 113 | Newport, RI/Navy | .36 |
| 114 | Edwards AFB, CA/AFCOMS | .35 |
| 115 | England AFB, LA/AFCOMS | .35 |
| 116 | Holloman AFB, NM/AFCOMS | .35 |
| *84* | *Hellenikon AB, Greece/ AFCOMS* | *.35* |
| *85* | *Aviano AB, Italy/AFCOMS* | *.35* |
| *86* | *Riyadh, Saudi Arabia/TSA* | *.35* |
| 117 | Portsmouth, VA/Navy | .35 |
| 118 | Fitzsimons AMC, CO/TSA | .34 |
| *87* | *Camp New Amsterdam, NL/ AFCOMS* | *.34* |
| *88* | *Kelley Barracks, FRG/TSA* | *.34* |
| *89* | *Sigonella, Italy/Navy* | *.34* |
| 119 | Gunter AFB, AL/AFCOMS | .33 |
| *90* | *Ft. Gulick, Panama/TSA* | *.33* |

*Continued on page 74*

*Continued from page 73*

| Rank | Store/Parent Organization | ACV |
|---|---|---|
| 120 | Whidbey Island, WA/Navy | .33 |
| 121 | Mayport, FL/Navy | .33 |
| 122 | Aberdeen Prov. Grnds., MD/ TSA | .32 |
| 123 | Los Angeles AFB, CA/ AFCOMS | .32 |
| 124 | Hurlburt Field, FL/AFCOMS | .32 |
| 125 | Malmstrom AFB, MT/AFCOMS | .32 |
| 126 | Mt. Home AFB, ID/AFCOMS | .32 |
| 127 | Bangor, WA/Navy | .32 |
| 128 | Selfridge ANG, MI/TSA | .31 |
| 129 | Ft. Hamilton, NY/TSA | .31 |
| *91* | *RAF Greenham Common, UK/AFCOMS* | *.30* |
| 130 | Mare Island, CA/Navy | .30 |
| *92* | *Iwakuni, Japan/USMC* | *.30* |
| 131 | Hunter AAF, GA/TSA | .29 |
| 132 | Columbus AFB, MS/AFCOMS | .29 |
| 133 | Moody AFB, GA/AFCOMS | .29 |
| 134 | F.E. Warren AFB, WY/ AFCOMS | .29 |
| 135 | Plattsburgh AFB, NY/ AFCOMS | .29 |
| 136 | Myrtle Beach AFB, SC/ AFCOMS | .29 |
| 137 | Whiteman AFB, MO/AFCOMS | .28 |
| *93* | *Pusan, Korea/TSA* | *.28* |
| 138 | Charleston NS, SC/Navy | .28 |
| 139 | New Orleans, LA/Navy | .28 |
| 140 | Carlisle Barracks, PA/TSA | .27 |
| 141 | Kelly AFB, TX/AFCOMS | .27 |
| *94* | *San Vito AS, Italy/AFCOMS* | *.27* |
| *95* | *Wildflecken, FRG/TSA* | *.27* |

*Continued on page 116*

## It's A Fact!

Do you know which are the 20 *overseas* military commissaries reporting the highest FY85 total store sales? They are:

1. Pearl Harbor, HI *($53,167,921)*
2. Yongsan, Korea *($35,537,102)*
3. Hickam AFB, HI *($30,349,271)*
4. Schofield Barracks, HI *($29,618,591)*
5. Clark AB, PI *($27,972,028)*
6. Elmendorf AFB, AK *($26,447,020)*
7. Kadena AB, Japan *($22,423,400)*
8. Ramstein AB, FRG *($20,657,354)*
9. Corozal, Panama *($20,163,431)*
10. Guam *($18,626,933)*
11. Osan AB, Korea *($18,588,562)*
12. Frankfurt, FRG *($15,101,011)*
13. Andersen AFB, Guam *($14,486,180)*
14. Feurth, FRG *($14,390,656)*
15. Yokota AB, Japan *($13,740,911)*
16. Vogelweh, FRG *($13,655,125)*
17. RAF Lakenheath, UK *($13,315,665)*
18. Weisbaden, FRG *($12,904,305)*
19. Heidelberg, FRG *($12,262,201)*
20. Kaneohe Bay, HI *($12,252,941)*

McDonald's®

We're Serving You Now . . .

# Air Force Commissary Sales—FY85

## OVERSEAS

### Alaska Stores/AFCOMS

| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| Eielson AFB. AK | 4 | 8,347,462 | 80 | 15 | 5 | +6.6 | 9,130 | 76 | .88 |
| Elmendorf AFB, AK | 8 | 26,447,020 | 76 | 19 | 5 | −5.3 | 31,129 | 71 | 2.80 |
| **Totals** | | **$34,794,482** | **78%** | **17%** | **5%** | **−2.6%** | **40,259** | **$72** | **3.69%** |

### Central European Complex/AFCOMS

| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| Bitburg AB, FRG | 4 | 7,780,944 | 83 | 12 | 5 | +3.2 | 13,877 | 47 | .82 |
| Hahn AB, FRG | 4 | 7,547,904 | 85 | 11 | 4 | +0.9 | 10,312 | 61 | .80 |
| Hessisch-Oldendorf, FRG | 1 | 1,023,906 | 96 | 0 | 4 | −1.0 | 3,173 | 27 | .11 |
| Oslo, Norway | 1 | 775,288 | 89 | 4 | 7 | +3.5 | 2,571 | 25 | .08 |
| Preum AS, FRG | 1 | 418,703 | 100 | 0 | 0 | +0.8 | 4,409 | 8 | .04 |
| Ramstein AB, FRG | 7 | 20,657,354 | 81 | 13 | 6 | +1.6 | 24,616 | 70 | 2.19 |
| Rhein Main AB, FRG | 5 | 9,410,170 | 83 | 13 | 4 | +0.2 | 15,300 | 51 | 1.00 |
| Sembach AB, FRG | 3 | 4,416,563 | 81 | 13 | 6 | −0.1 | 8,352 | 44 | .47 |
| Spangdahlem AB, FRG | 3 | 5,071,045 | 84 | 12 | 4 | +3.8 | 7,664 | 55 | .54 |
| Trier HA, FRG | 1 | 138,901 | 100 | 0 | 0 | +8.6 | 3,348 | 3 | .01 |
| Vogelweh, FRG | 6 | 13,655,125 | 81 | 14 | 5 | −2.6 | 17,349 | 66 | 1.45 |
| **Complex Totals** | | **$70,895,903** | **86%** | **10%** | **4%** | **/b** | **110,971** | **$53** | **7.51%** |

/b Comparison with prior year's data not meaningful because Complex was created in FY 85 from merger of 3 separate regions.

### Greece Complex/AFCOMS

| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| Hellenikon AB | 2 | 3,278,017 | 88 | 8 | 4 | −8.2 | 8,395 | 33 | .35 |
| Hellenikon Branch | 1 | 1,349,795 | 95 | 0 | 5 | +31.7 | 2,653 | 42 | .14 |
| Iraklion AS (Crete) | 2 | 1,735,313 | 86 | 8 | 6 | +3.1 | 4,206 | 34 | .18 |
| **Complex Totals** | | **$6,363,125** | **87%** | **8%** | **5%** | **+3.1%** | **15,254** | **$35** | **.67%** |

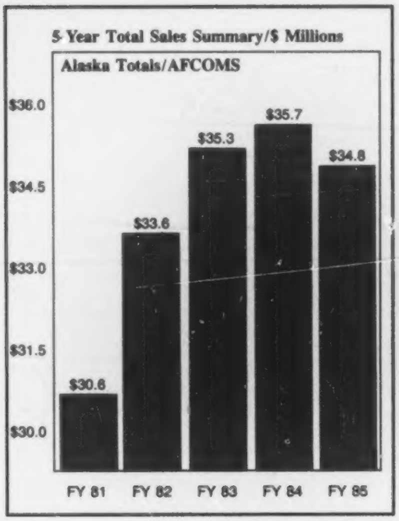
/a Less than 0.1%.
/b Comparison with prior year's data not meaningful.
/c New store opened 4th qtr FY85.
/d Transferred from TSA to AFCOMS in FY85.
**N.A.** Totals not meaningful for comparison purposes.
- Comparable data not available due to FY85 merger of 15 "Complex" management areas into 8 "Regions."

Store classes for Air Force commissaries are based upon total average monthly sales, as follows:

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Class 1 | Up to $100,000 | Class 3 | $300,001-$500,000 | Class 5 | $750,001-$1,000,000 | Class 7 | $1,500,001-$2,000,000 |
| Class 2 | $100,001-$300,000 | Class 4 | $500,001-$750,000 | Class 6 | $1,000,001-$1,500,000 | Class 8 | Over $2,000,000 |

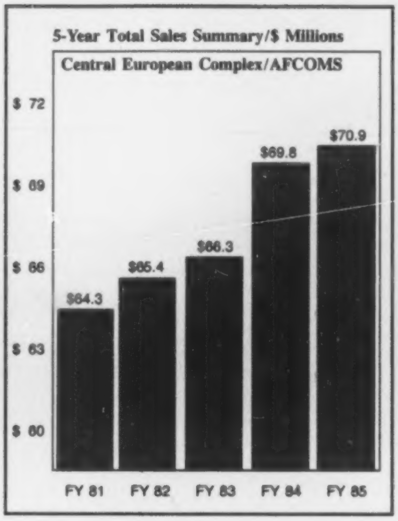
**Notes:** All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY85 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data.

# Air Force Commissary Sales—FY85



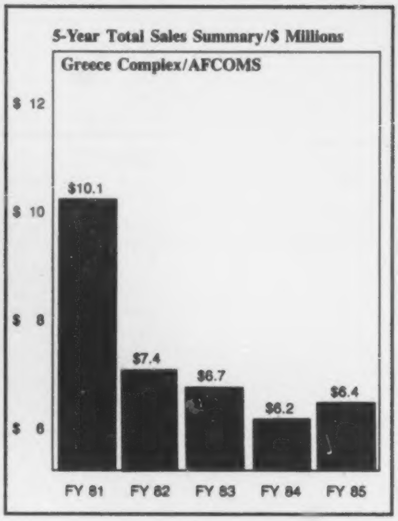
5-Year Total Sales Summary/$ Millions

Alaska Totals/AFCOMS



5-Year Total Sales Summary/$ Millions

Central European Complex/AFCOMS



5-Year Total Sales Summary/$ Millions

Greece Complex/AFCOMS

## Okinawa Complex/AFCOMS

| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| Butler | 5 | 12,122,135 | 81 | 13 | 6 | +6.5 | 16,100 | 63 | 1.28 |
| Kadena AB | 7 | 22,423,400 | 79 | 14 | 7 | +6.6 | 29,225 | 64 | 2.38 |
| Kinser | 3 | 4,420,147 | 100 | 0 | 0 | +3.3 | 0 | 0 | .47 |
| Makiminato | 2 | 3,593,010 | 81 | 14 | 5 | +1.8 | 8,412 | 36 | .38 |
| **Complex Totals** | | **$42,558,692** | **82%** | **12%** | **6%** | **+6.2%** | **53,737** | **$66** | **4.51%** |

## Spain Complex/AFCOMS

| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| Royal Oaks HA | 1 | 565,238 | 95 | 0 | 5 | −5.6 | 1,315 | 36 | .06 |
| Torrejon AB | 4 | 7,598,446 | 86 | 10 | 4 | −3.4 | 15,893 | 40 | .80 |
| Zaragoza | 2 | 2,200,162 | 87 | 9 | 4 | −0.7 | 5,384 | 34 | .23 |
| **Complex Totals** | | **$10,363,846** | **87%** | **9%** | **4%** | **−3.0%** | **22,592** | **$38** | **1.10%** |

/a Less than 0.1%.
/b Comparison with prior year's data not meaningful.
/c New store opened 4th qtr FY85.
/d Transferred from TSA to AFCOMS in FY85.
N.A. Totals not meaningful for comparison purposes.
* Comparable data not available due to FY85 merger of 15 "Complex" management areas into 8 "Regions."

Store classes for Air Force commissaries are based upon total average monthly sales, as follows:

| | | | |
|---|---|---|---|
| Class 1 Up to $100,000 | Class 3 $300,001-$500,000 | Class 5 $750,001-$1,000,000 | Class 7 $1,500,001-$2,000,000 |
| Class 2 $100,001-$300,000 | Class 4 $500,001-$750,000 | Class 6 $1,000,001-$1,500,000 | Class 8 Over $2,000,000 |

**Notes:** All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY85 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data.

# Air Force Commissary Sales—FY85

**It's A Fact!**

Do you know how many military commissaries there were in operation worldwide in FY85? The answer: 375.

## United Kingdom Complex/AFCOMS

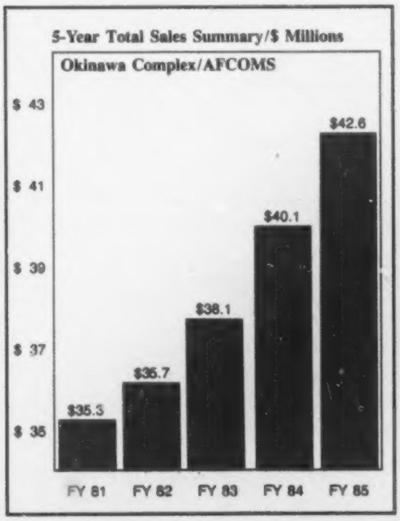
| Store | Store Class | Total Store $ Sales | % of Store Total Grocery | % of Store Total Meat | % of Store Total Produce | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| RAF Alconbury | 3 | 5,526,209 | 78 | 17 | 5 | −3.3 | 10,000 | 46 | .59 |
| RAF Bentwaters | 4 | 7,745,915 | 79 | 15 | 6 | −2.9 | 12,979 | 50 | .82 |
| RAF Burtonwood /c | 1 | 32,530 | 100 | 0 | 0 | .0 | 1,127 | 2 | /a |
| RAF Chicksands | 2 | 2,261,620 | 82 | 14 | 4 | −4.6 | 4,725 | 40 | .24 |
| RAF Fairford | 2 | 2,433,704 | 79 | 16 | 5 | 7 | 5,421 | 37 | .26 |
| RAF Greenham Common | 2 | 2,789,813 | 81 | 14 | 5 | +4.1 | 7,213 | 32 | .30 |
| RAF Lakenheath | 6 | 13,315,665 | 81 | 15 | 4 | −4.3 | 13,320 | 83 | 1.41 |
| RAF Menwith Hill /d | 2 | 1,488,595 | 77 | 18 | 5 | −6.0 | 2,926 | 42 | .16 |
| RAF Sculthorpe | 1 | 146,480 | 100 | 0 | 0 | −62.6 | 3,148 | 4 | .02 |
| RAF Upper Heyford | 4 | 8,357,470 | 79 | 17 | 4 | −6.1 | 12,624 | 55 | .89 |
| RAF Wethersfield | 1 | 876,403 | 78 | 17 | 5 | −9.8 | 3,945 | 19 | .09 |
| **Complex Totals** | | **$44,974,404** | **79%** | **16%** | **5%** | **−0.1%** | **77,428** | **$48** | **4.76%** |

/a Less than 0.1%.
/b Comparison with prior year's data not meaningful.
/c New store opened 4th qtr FY85.
/d Transferred from TSA to AFCOMS in FY85.
N.A. Totals not meaningful for comparison purposes.
* Comparable data not available due to FY85 merger of 15 "Complex" management areas into 8 "Regions."

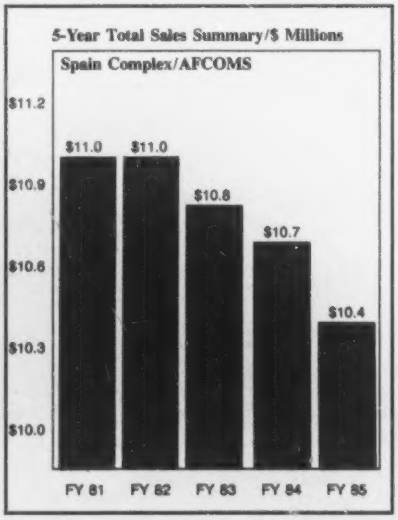
Store classes for Air Force commissaries are based upon total average monthly sales, as follows:

| | | | |
|---|---|---|---|
| Class 1 Up to $100,000 | Class 3 $300,001-$500,000 | Class 5 $750,001-$1,000,000 | Class 7 $1,500,001-$2,000,000 |
| Class 2 $100,001-$300,000 | Class 4 $500,001-$750,000 | Class 6 $1,000,001-$1,500,000 | Class 8 Over $2,000,000 |

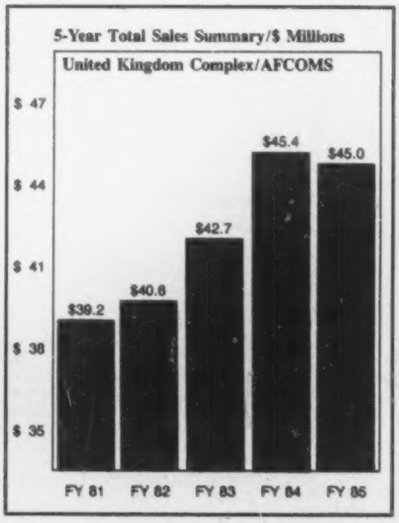
**Notes:** All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY85 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data.


**5-Year Total Sales Summary/$ Millions**

**Okinawa Complex/AFCOMS**


**5-Year Total Sales Summary/$ Millions**

**Spain Complex/AFCOMS**


**5-Year Total Sales Summary/$ Millions**

**United Kingdom Complex/AFCOMS**

# Air Force Commissary Sales—FY85

## Non-Complex Stores Overseas/AFCOMS

| Store | Store Class | Total Store $ Sales | % of Store Total Grocery | % of Store Total Meat | % of Store Total Produce | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| Anderson AFB, Guam | 6 | 14,486,180 | 78 | 15 | 7 | −1.4 | 15,300 | 79 | 1.53 |
| Ankara, Turkey | 2 | 1,879,194 | 89 | 7 | 7 | +10.7 | 10,856 | 14 | .20 |
| Aviano AB, Italy | 2 | 3,336,122 | 85 | 10 | 5 | −0.3 | 6,840 | 41 | .35 |
| Camp New Amsterdam, NL | 2 | 3,235,440 | 82 | 13 | 5 | −2.6 | 10,579 | 25 | .34 |
| Clark AB, PI | 8 | 27,972,028 | 81 | 12 | 7 | +2.5 | 23,128 | 101 | 2.96 |
| Hickam AFB, HI | 8 | 30,349,271 | 76 | 17 | 7 | −2.4 | 22,144 | 114 | 3.21 |
| Incirlik, Turkey | 3 | 4,803,193 | 88 | 8 | 4 | +16.6 | 8,192 | 49 | .51 |
| Izmir, Turkey | 2 | 2,103,057 | 90 | 7 | 3 | +6.1 | 5,220 | 34 | .22 |
| Lajes Field, Azores | 3 | 4,357,463 | 88 | 8 | 4 | +3.8 | 6,354 | 57 | .46 |
| Misawa AB, Japan | 4 | 8,222,838 | 80 | 14 | 6 | +15.5 | 21,151 | 32 | .87 |
| Osan AB, Korea | 7 | 18,588,562 | 76 | 20 | 4 | −3.0 | 20,250 | 77 | 1.97 |
| San Vito AS, Italy | 2 | 2,576,693 | 86 | 9 | 5 | +1.5 | 6,270 | 34 | .27 |
| Yokota AB, Japan | 4 | 13,740,911 | 80 | 17 | 3 | +2.5 | 14,490 | 79 | 1.46 |
| **Non-Complex Stores' Totals** | | **$135,650,952** | **N.A.** | **N.A.** | **N.A.** | **N.A.** | **170,774** | **$66** | **14.37%** |
| **Overseas AFCOMS Totals** | | **$345,601,404** | **83%** | **12%** | **5%** | **+1.2%** | **491,015** | **$59** | **36.61%** |
| **Worldwide AFCOMS Totals** | | **$2,058,410,575** | **81%** | **14%** | **5%** | **−0.1%** | **2,395,944** | **$72** | **44.77%** |

/a Less than 0.1%.
/b Comparison with prior year's data not meaningful.
/c New store opened 4th qtr FY85.
/d Transferred from TSA to AFCOMS in FY85.
N.A. Totals not meaningful for comparison purposes.
* Comparable data not available due to FY85 merger of 15 "Complex" management areas into 8 "Regions."

Store classes for Air Force commissaries are based upon total average monthly sales, as follows:

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Class 1 | Up to $100,000 | Class 3 | $300,001–$500,000 | Class 5 | $750,001–$1,000,000 | Class 7 | $1,500,001–$2,000,000 |
| Class 2 | $100,001–$300,000 | Class 4 | $500,001–$750,000 | Class 6 | $1,000,001–$1,500,000 | Class 8 | Over $2,000,000 |

**Notes:** All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY85 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data.

## It's A Fact!

Military commissaries have a unique mission. They operate in almost every corner of the globe to bring a "taste of home" to military personnel and other authorized patrons. In fact, as of September 30, 1985, commissaries were in operation in 25 overseas areas. Can you name them? They are:

1. Alaska
2. Australia
3. Azores
4. Belgium
5. Bermuda
6. Canada
7. Cuba
8. Egypt
9. Germany (includes Berlin Free Zone)
10. Greece
11. Guam
12. Hawaii
13. Iceland
14. Italy
15. Japan
16. Korea
17. The Netherlands
18. Norway
19. Panama
20. The Philippines
21. Puerto Rico
22. Saudi ARabia
23. Spain
24. Turkey
25. United Kingdom

# Army Commissary Sales—FY85

## Midwest Region/TSA

| Store | Store Class | Total Store $ Sales | % of Store Total: Grocery | Meat | Produce | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| Ft. Ben Harrison, IN | 6 | 16,257,714 | 80 | 15 | 5 | +3.8 | 16,336 | 83 | .45 |
| Ft. Bliss, TX | 8 | 50,234,415 | 81 | 15 | 4 | −0.5 | 32,538 | 129 | 1.38 |
| Ft. Carson, CO | 8 | 32,353,304 | 81 | 15 | 4 | −0.8 | 21,864 | 123 | .89 |
| Fitzsimons AMC, CO | 6 | 12,290,372 | 82 | 13 | 5 | −3.8 | 8,712 | 118 | .34 |
| Granite City AD, IL | 6 | 15,170,238 | 84 | 13 | 3 | −2.6 | 20,789 | 61 | .42 |
| Ft. Hood, TX | 8 | 51,389,189 | 81 | 15 | 4 | −0.9 | 36,551 | 117 | 1.41 |
| Ft. Leavenworth, KS | 7 | 19,325,163 | 83 | 13 | 4 | +1.6 | 18,437 | 87 | .53 |
| Ft. Leonard Wood, MO | 7 | 18,379,958 | 84 | 11 | 4 | −1.1 | 18,512 | 83 | .50 |
| Ft. Polk, LA | 7 | 21,721,365 | 82 | 14 | 4 | +1.6 | 19,642 | 92 | .59 |
| Ft. Riley, KS | 7 | 19,305,367 | 83 | 14 | 3 | −0.6 | 23,500 | 68 | .53 |
| Rock Island, IL | 3 | 3,891,848 | 85 | 12 | 3 | −3.8 | 6,944 | 47 | .11 |
| Ft. Sam Houston, TX | 8 | 34,090,259 | 82 | 14 | 4 | +5.1 | 26,904 | 106 | .93 |
| Selfridge AnG, MI | 5 | 11,231,305 | 85 | 12 | 3 | −1.9 | 9,687 | 97 | .31 |
| Ft. Sheridan, IL | 4 | 7,612,005 | 87 | 9 | 4 | −1.5 | 8,698 | 73 | .21 |
| Ft. Sill, OK | 8 | 32,149,204 | 81 | 15 | 4 | +2.3 | 32,951 | 81 | .88 |
| White Sands, NM | 3 | 3,601,566 | 82 | 14 | 4 | −2.5 | 6,768 | 44 | .10 |
| **Region Totals** | | **$349,003,272** | **82%** | **14%** | **4%** | **+0.2%** | **308,833** | **$94** | **9.55%** |

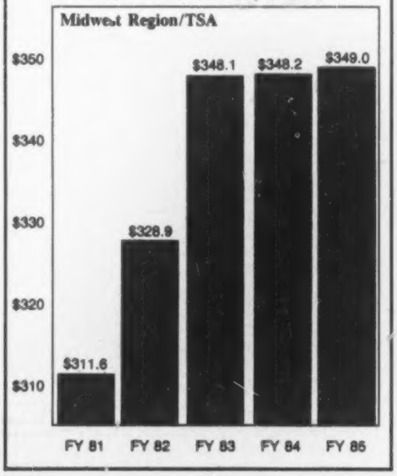
/a Less than 0.1%.
N.C. No change.
N.A. Totals not meaningful for comparison purposes.

Store classes for Army commissaries are based upon total average monthly sales, as follows:

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Class 1 | Up to $100,000 | Class 3 | $300,001-$500,000 | Class 5 | $750,001-$1,000,000 | Class 7 | $1,500,001-$2,000,000 |
| Class 2 | $100,001-$300,000 | Class 4 | $500,001-$750,000 | Class 6 | $1,000,001-$1,500,000 | Class 8 | Over $2,000,000 |

**Notes:** All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY85 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data.

5-Year Total Sales Summary/$ Millions



## It's A Fact!

Many commissaries reported total store sales declines in FY85. Can you name the ten CONUS commissaries that reported the greatest total store sales declines? They are:

1. North Truro AFS, MA (*−30.7*)
2. Lexington, KY (*−17.3*)
3. Oakdale ASC, PA (*−13.7*)
4. Calumet AFS, MI (*−8.5*)
5. Gunter AFB, AL (*−7.4*)
6. Offutt AFB, NE (*−6.8*)
7. England AFB, LA (*−5.8*)
8. Fort Fisher AFS, NC (*−5.7*)
9. McChord AFB, WA (*−5.4*)
10. Mather AFB, CA (*−5.3*)

# Army Commissary Sales—FY85

## Northeast Region/TSA

| Store | Store Class | Total Store $ Sales | % of Store Total |  |  | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
|  |  |  | Grocery | Meat | Produce |  |  |  |  |
| Aberdeen Prov. Grnds., MD | 5 | 11,819,195 | 84 | 12 | 4 | +0.5 | 14,229 | 69 | .32 |
| ARDC (Picatinny), PA | 2 | 2,701,203 | 84 | 12 | 4 | +9.4 | 6,400 | 35 | .07 |
| Ft. Belvoir, VA | 8 | 51,682,254 | 79 | 16 | 5 | +7.3 | 26,385 | 163 | 1.41 |
| Cameron Station, VA | 8 | 31,285,390 | 80 | 14 | 6 | +1.9 | 31,616 | 82 | .86 |
| Carlisle Barracks, PA | 5 | 9,773,753 | 83 | 13 | 4 | −1.9 | 12,072 | 67 | .27 |
| Ft. Devens, MA | 6 | 16,049,688 | 83 | 13 | 4 | −3.4 | 14,705 | 91 | .44 |
| Ft. Drum, NY | 3 | 4,822,804 | 82 | 14 | 4 | +9.7 | 4,347 | 92 | .13 |
| Edgewood Arsenal, MD | 3 | 5,900,831 | 84 | 12 | 4 | −4.1 | 11,658 | 42 | .16 |
| Ft. Hamilton, NY | 5 | 11,220,786 | 86 | 10 | 4 | +8.8 | 11,400 | 82 | .31 |
| Ft. McNair, DC | 4 | 6,868,961 | 81 | 14 | 5 | −2.6 | 12,911 | 44 | .19 |
| Ft. Meade, MD | 8 | 30,410,865 | 82 | 14 | 4 | +1.1 | 27,178 | 93 | .83 |
| Ft. Monmouth, NJ | 6 | 18,069,450 | 83 | 12 | 5 | −0.4 | 24,064 | 63 | .49 |
| Ft. Myer, VA | 7 | 21,338,273 | 81 | 15 | 4 | +1.0 | 19,050 | 93 | .58 |
| New Cumberland, PA | 4 | 6,388,313 | 88 | 10 | 2 | +0.5 | 16,490 | 32 | .17 |
| Oakdale ASC, PA | 4 | 7,523,892 | 85 | 12 | 3 | −13.7 | 6,000 | 105 | .21 |
| Ft. Ritchie, MD | 4 | 6,793,122 | 83 | 13 | 4 | −2.8 | 5,500 | 103 | .19 |
| Seneca AD, NY | 2 | 2,658,333 | 83 | 14 | 3 | +6.8 | 3,866 | 57 | .07 |
| Stewart ASE, NY | 3 | 4,116,543 | 82 | 14 | 4 | −0.8 | 5,900 | 58 | .15 |
| Tobyhanna AD, PA | 3 | 5,522,935 | 88 | 9 | 3 | −2.9 | 9,000 | 51 | .15 |
| Vint Hill Farms, VA | 4 | 7,810,275 | 80 | 16 | 4 | −0.9 | 8,088 | 80 | .21 |
| Walter Reed AMC, DC | 8 | 24,555,665 | 80 | 16 | 4 | −2.5 | 25,858 | 79 | .67 |
| West Point, NY | 4 | 8,751,288 | 78 | 16 | 6 | −0.8 | 5,450 | 134 | .24 |
| **Region Totals** |  | **$296,063,819** | **82%** | **14%** | **4%** | **+1.0%** | **302,167** | **$82** | **8.10%** |

/a Less than 0.1%.
**N.C.** No change.
**N.A.** Totals not meaningful for comparison purposes.

Store classes for Army commissaries are based upon total average monthly sales, as follows:

|  |  |  |  |  |  |  |  |
|---|---|---|---|---|---|---|---|
| Class 1 | Up to $100,000 | Class 3 | $300,001-$500,000 | Class 5 | $750,001-$1,000,000 | Class 7 | $1,500,001-$2,000,000 |
| Class 2 | $100,001-$300,000 | Class 4 | $500,001-$750,000 | Class 6 | $1,000,001-$1,500,000 | Class 8 | Over $2,000,000 |

**Notes:** All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY85 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data.

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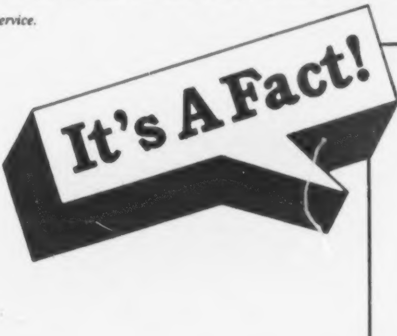

Can you name the ten CONUS military commissaries that last year reported the highest average monthly dollar sales per square feet of selling space? They are:

1. Ft. Lewis, WA (*$208*)
2. Oakland AB, CA (*$201*)
3. Ft. Jackson, SC (*$183*)
4. MacDill AFB, FL (*$168*)
5. Ft. Ord, CA (*$164*)
6. Ft. Belvoir, VA (*$163*)
7. West Point, NY (*$134*)
8. Ft. Bliss, TX (*$129*)
9. Ft. Carson, CO (*$123*)
10. Moffett Field, CA (*$122*)

# Army Commissary Coupon Redemptions—FY85

## CONUS

| Region | Number | % Share CONUS | % Share Worldwide | $ Value | % Share CONUS | % Share Worldwide |
|---|---|---|---|---|---|---|
| Midwest | 13,500,000 | 28.7 | 27.4 | 4,596,314 | 29.5 | 28.4 |
| Northeast | 13,300,000 | 28.3 | 27.0 | 4,333,975 | 27.8 | 26.8 |
| Southeast | 15,000,000 | 31.9 | 30.4 | 4,951,561 | 31.8 | 30.6 |
| Western | 5,200,000 | 11.1 | 10.6 | 1,696,416 | 10.9 | 10.5 |
| **CONUS Totals** | **47,000,000** | **100.0%** | **95.4%** | **$15,578,266** | **100.0%** | **96.3%** |

## Overseas

| Region | Number | % Share Overseas | % Share Worldwide | $ Value | % Share Overseas | % Share Worldwide |
|---|---|---|---|---|---|---|
| Europe | 2,300,000 | 100.0 | 4.6 | 593,849 | 100.0 | 3.7 |
| **Overseas Totals** | **2,300,000** | **100.0%** | **4.6%** | **$593,849** | **100.0%** | **3.7%** |
| **Worldwide Totals** | **49,300,000** | – | **100.0%** | **$16,172,115** | – | **100.0%** |

**Note:** Data reported for Army commissaries do not reflect actual geographic distribution of coupon redemptions because official figures are reported by Region, with many stores in certain Regions actually operating overseas but reported in CONUS data, and vice-versa.

A SALUTE TO YOUR GOOD TASTE.

We salute your good taste in participating in Sunshine's "Patron Savings Program" by offering your customers the good taste, and good value of Sunshine cookies and crackers.

Sunshine has a quality heritage of over 80 years, and every cookie and cracker we bake is made with only the finest ingredients and 100% pure vegetable shortening.

You can count on the continuing support of a strong national and regional program to help you build volume and profits. Just call Mr. Pete Anna (201-254-2000) for all the details.

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CHEEZ-IT
HiHo
KRISPY
Vienna Fingers
Chip-A-Roos

# Army Commissary Sales—FY85

## Southeast Region/TSA

| Store | Store Class | Total Store $ Sales | % of Store Total<br>Grocery | Meat | Produce | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| Ft. Benning, GA | 8 | 38,556,256 | 81 | 14 | 4 | +0.7 | 32,729 | 98 | 1.06 |
| Ft. Bragg, NC | 8 | 50,784,798 | 81 | 16 | 3 | −1.1 | 42,134 | 100 | 1.39 |
| Ft. Campbell, KY | 8 | 34,999,036 | 81 | 16 | 3 | +5.2 | 25,770 | 113 | .96 |
| Ft. Eustis, VA | 7 | 19,719,741 | 82 | 14 | 4 | +2.1 | 23,669 | 69 | .54 |
| Ft. Gillem, GA | 7 | 22,235,360 | 83 | 14 | 3 | N.C. | 22,156 | 84 | .61 |
| Ft. Gordon, GA | 8 | 26,408,190 | 80 | 15 | 5 | +1.1 | 22,712 | 97 | .72 |
| Hunter AAF, GA | 5 | 10,681,564 | 81 | 14 | 4 | −0.9 | 17,500 | 51 | .29 |
| Ft. Jackson, SC | 7 | 22,576,681 | 82 | 13 | 5 | +0.4 | 10,280 | 183 | .62 |
| Ft. Knox, KY | 8 | 32,000,849 | 81 | 15 | 4 | +2.6 | 31,025 | 86 | .88 |
| Ft. Lee, VA | 7 | 18,990,900 | 80 | 15 | 5 | −1.0 | 25,240 | 63 | .52 |
| Lexington, KY | 2 | 2,548,344 | 91 | 6 | 3 | −17.3 | 3,081 | 69 | .07 |
| Ft. McClellan, AL | 6 | 15,617,922 | 83 | 13 | 4 | −4.0 | 15,286 | 85 | .43 |
| Ft. McPherson, GA | 3 | 5,604,309 | 83 | 13 | 4 | −0.3 | 8,100 | 58 | .15 |
| Camp Merrill, GA | 1 | 337,811 | 89 | 9 | 2 | −0.7 | 1,416 | 20 | .01 |
| Ft. Monroe, VA | 4 | 7,567,859 | 82 | 14 | 4 | +1.3 | 8,049 | 78 | .21 |
| Redstone Arsenal, AL | 7 | 21,886,501 | 81 | 14 | 5 | N.C. | 21,279 | 86 | .60 |
| Richmond DGSC, VA | 3 | 5,290,997 | 81 | 14 | 4 | −0.9 | 12,586 | 35 | .14 |
| Ft. Rucker, AL | 7 | 18,174,534 | 84 | 12 | 4 | +3.3 | 17,200 | 88 | .50 |
| Ft. Stewart, GA | 6 | 15,696,719 | 80 | 16 | 4 | +2.6 | 27,953 | 47 | .43 |
| **Region Totals*** |  | **$369,678,371** | **81%** | **15%** | **4%** | **+0.7%** | **368,165** | **$84** | **10.12%** |

* Excludes sales for Ft. Buchanan, PR, which are reported in overseas data.

/a Less than 0.1%.
N.C. No change.
N.A. Totals not meaningful for comparison purposes.

Store classes for Army commissaries are based upon total average monthly sales, as follows:
Class 1 Up to $100,000
Class 2 $100,001-$300,000
Class 3 $300,001-$500,000
Class 4 $500,001-$750,000
Class 5 $750,001-$1,000,000
Class 6 $1,000,001-$1,500,000
Class 7 $1,500,001-$2,000,000
Class 8 Over $2,000,000

**Notes:** All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY85 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data.

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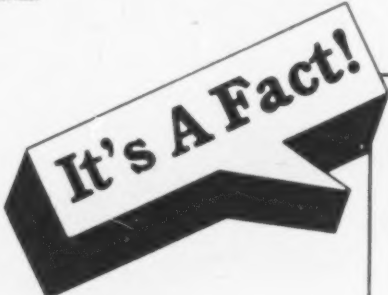
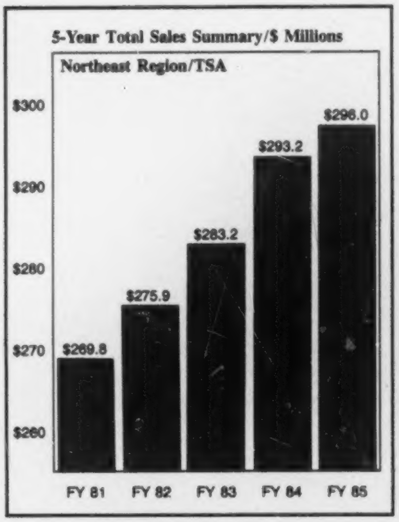
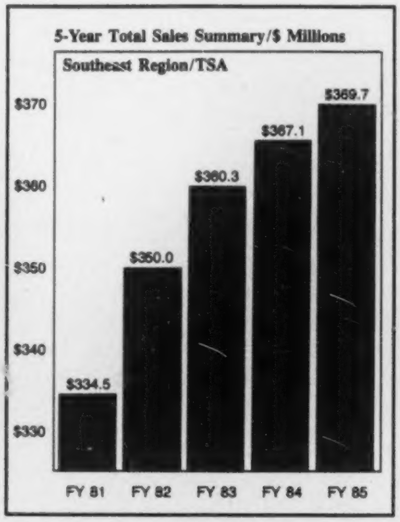


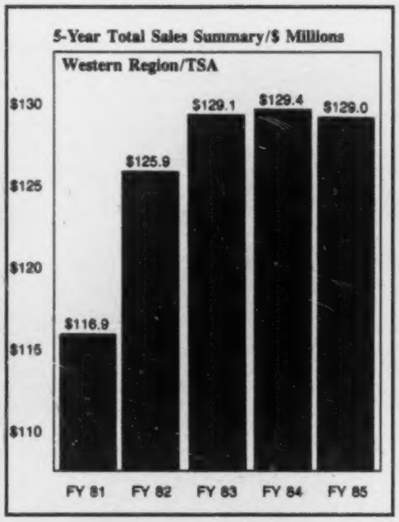
Can you name the ten (okay, 11—because three stores tied) overseas military commissaries that last year reported the highest average monthly dollar sales per square feet of selling space? They are:

1. Pearl Harbor, HI (*$180*)
2. Corozal, Panama (*$145*)
3. Subic Bay, PI (*$132*)
4. Mainz, FRG (*$122*)
5. Pusan, Korea (*$119*)
6. Hickam AFB, HI (*$114*)
7. Vicenza, Italy (*$112*)
8. Ft. Buchanan, PR (*$103*)
9. Clark AB, Korea (*$101*)
10. Guam (*$101*)
11. Yongsan, Korea (*$101*)

# Army Commissary Sales—FY85







## Western Region/TSA

| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| Dugway Prov. Grnds., UT | 2 | 1,741,093 | 85 | 10 | 5 | −1.4 | 7,056 | 21 | .05 |
| Ft. Huachuca, AZ | 6 | 16,299,328 | 80 | 16 | 4 | +0.6 | 20,008 | 68 | .45 |
| Ft. Irwin, CA | 3 | 3,992,233 | 81 | 14 | 5 | +10.1 | 5,554 | 60 | .11 |
| Ft. Lewis, WA | 8 | 41,449,948 | 82 | 14 | 4 | −0.2 | 16,605 | 208 | 1.13 |
| Oakland AB, CA | 4 | 7,406,774 | 83 | 14 | 3 | −4.5 | 3,072 | 201 | .20 |
| Ft. Ord, CA | 8 | 35,797,888 | 82 | 14 | 4 | +1.0 | 18,190 | 164 | .98 |
| Presidio of S.F., CA | 7 | 18,596,719 | 77 | 16 | 7 | −3.5 | 23,264 | 67 | .51 |
| Sierra AD, CA | 2 | 2,009,925 | 84 | 13 | 3 | −3.4 | 4,500 | 37 | .06 |
| Yuma Prov. Grnds., AZ | 2 | 1,746,070 | 85 | 11 | 4 | −0.7 | 8,436 | 17 | .05 |
| **Region Totals*** | | **$129,034,978** | **81%** | **15%** | **4%** | **+0.3%** | **106,685** | **$101** | **3.53%** |
| **CONUS TSA Totals** | | **$1,143,780,440** | **82%** | **13%** | **5%** | **+0.5%** | **1,085,850** | **$88** | **31.31%** |

* Excludes sales for Forts Richardson, Greely and Wainwright, AK, and Schofield Barracks, HI, which are reported in overseas data.

/a Less than 0.1%.
N.C. No change.
N.A. Totals not meaningful for comparison purposes.

Store classes for Army commissaries are based upon total average monthly sales, as follows:

| | |
|---|---|
| Class 1 | Up to $100,000 |
| Class 2 | $100,001-$300,000 |
| Class 3 | $300,001-$500,000 |
| Class 4 | $500,001-$750,000 |
| Class 5 | $750,001-$1,000,000 |
| Class 6 | $1,000,001-$1,500,000 |
| Class 7 | $1,500,001-$2,000,000 |
| Class 8 | Over $2,000,000 |

**Notes:** All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY85 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data.

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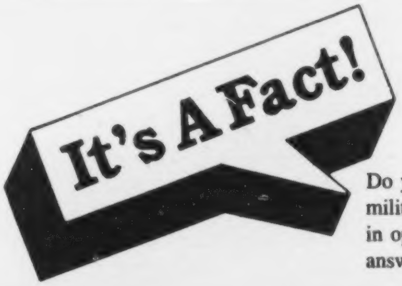
Do you know how many CONUS military commissaries there were in operation in FY85? The answer: 230.

# Army Commissary Sales—FY85

## Midwest Region/Panama—TSA

| Store | Store Class | Total Store $ Sales | % of Store Total Grocery | Meat | Produce | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| Corozal | 7 | 20,163,431 | 84 | 12 | 4 | +31.7 | 11,564 | 145 | 2.14 |
| Ft. Gulick | 2 | 3,147,451 | 81 | 14 | 5 | −38.3 | 5,200 | 50 | .33 |
| Kobbe/Howard | 4 | 6,340,448 | 83 | 13 | 4 | +38.5 | 5,400 | 98 | .67 |
| **Panama Totals** | | **$29,651,330** | **83%** | **12%** | **5%** | **+18.7%** | **22,164** | **$111** | **3.14%** |



Do you know how many overseas military commissaries there were in operation in FY85? The answer: 145.

## Southeast Region/Puerto Rico—TSA

| Store | Store Class | Total Store $ Sales | % of Store Total Grocery | Meat | Produce | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| Ft. Buchanan | 7 | $22,378,775 | 96% | 0% | 4 | **−10.0%** | **18,084** | **$103** | **2.37%** |

## Western Region/Alaska, Hawaii & Korea—TSA

| Store | Store Class | Total Store $ Sales | % of Store Total Grocery | Meat | Produce | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| Ft. Greely, AK | 2 | 2,090,768 | 79 | 16 | 5 | −2.6 | 6,290 | 28 | .22 |
| Pusan, Korea | 2 | 2,603,484 | 88 | 7 | 5 | −5.2 | 1,822 | 119 | .28 |
| Ft. Richardson, AK | 5 | 9,614,017 | 82 | 13 | 5 | −0.8 | 15,713 | 51 | 1.02 |
| Sagamihara, Japan | 3 | 5,586,591 | 85 | 11 | 4 | −13.8 | 16,792 | 28 | .59 |
| Schofield Barracks, HI | 8 | 29,618,591 | 81 | 13 | 6 | −1.8 | 31,452 | 78 | 3.14 |
| Taegu, Korea | 4 | 6,741,489 | 86 | 9 | 5 | −8.5 | 5,900 | 95 | .71 |
| Ft. Wainwright, AK | 4 | 7,541,636 | 80 | 15 | 5 | +0.9 | 8,066 | 78 | .80 |
| Yongsan, Korea | 8 | 35,537,102 | 85 | 10 | 5 | −9.7 | 29,387 | 101 | 3.76 |
| **Western (Overseas) Totals** | | **$99,333,678** | **83%** | **12%** | **5%** | **−5.8%** | **115,422** | **$72** | **10.52%** |

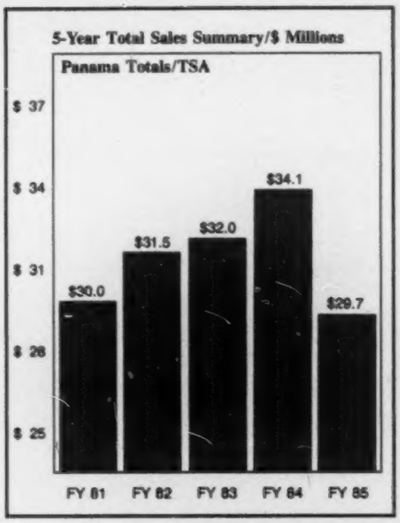
/a Less than 0.1%.
**N.C.** No change.
**N.A.** Totals not meaningful for comparison purposes.

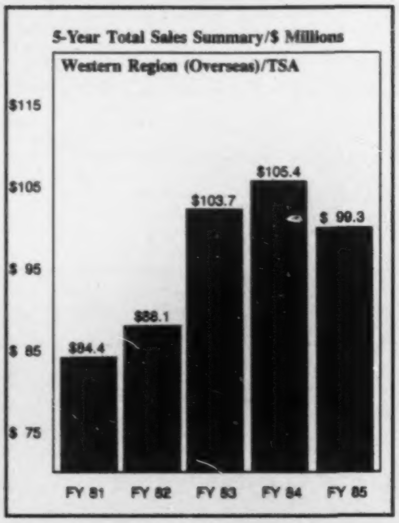
Store classes for Army commissaries are based upon total average monthly sales, as follows:

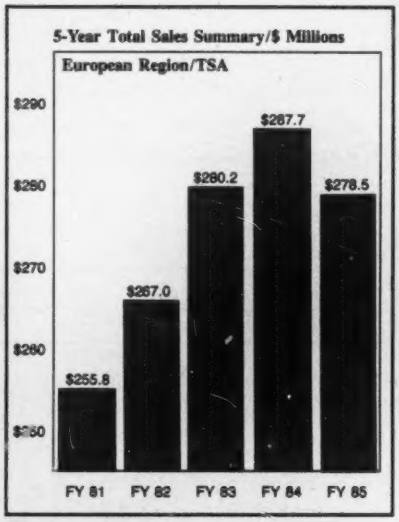
| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Class 1 | Up to $100,000 | Class 3 | $300,001-$500,000 | Class 5 | $750,001-$1,000,000 | Class 7 | $1,500,001-$2,000,000 |
| Class 2 | $100,001-$300,000 | Class 4 | $500,001-$750,000 | Class 6 | $1,000,001-$1,500,000 | Class 8 | Over $2,000,000 |

**Notes:** All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY85 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data.

# Army Commissary Sales—FY85







## European Region/TSA

| Store | Store Class | Total Store $ Sales | % of Store Total: Grocery | % of Store Total: Meat | % of Store Total: Produce | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| Amberg, FRG | 2 | 1,213,602 | 89 | 7 | 4 | −11.4 | 2,640 | 38 | .13 |
| Ansbach, FRG | 3 | 5,498,182 | 85 | 11 | 4 | −8.1 | 11,961 | 38 | .58 |
| Aschaffenburg, FRG | 3 | 4,617,068 | 86 | 10 | 4 | −4.6 | 10,881 | 35 | .49 |
| Augsburg, FRG | 4 | 8,106,095 | 86 | 10 | 4 | +1.9 | 9,749 | 69 | .86 |
| Bad Aibling, FRG | 1 | 777,437 | 87 | 8 | 5 | +10.6 | 4,310 | 15 | .08 |
| Bad Hersfeld, FRG | 1 | 1,145,620 | 88 | 8 | 4 | −9.1 | 3,390 | 28 | .12 |
| Bad Kissingen, FRG | 2 | 1,518,556 | 87 | 9 | 4 | −3.6 | 2,347 | 54 | .16 |
| Bad Kreuznach, FRG | 3 | 4,153,712 | 86 | 10 | 4 | +13.2 | 10,937 | 32 | .44 |
| Bad Nauheim, FRG | 2 | 2,372,624 | 86 | 10 | 4 | −0.4 | 6,176 | 32 | .25 |
| Bad Toelz, FRG | 1 | 992,655 | 83 | 11 | 6 | −3.9 | 4,572 | 18 | .11 |
| Bamberg, FRG | 4 | 6,198,900 | 86 | 10 | 4 | +2.0 | 9,332 | 55 | .66 |
| Baumholder, FRG | 4 | 7,631,768 | 85 | 10 | 5 | −3.6 | 14,055 | 45 | .81 |
| Berchtesgaden, FRG | 1 | 1,131,715 | 84 | 15 | 1 | −12.0 | 2,296 | 41 | .12 |
| Berlin (Free Zone), FRG | 5 | 9,717,123 | 82 | 11 | 7 | −1.7 | 17,352 | 47 | 1.03 |
| Bindlach, FRG | 1 | 987,854 | 89 | 7 | 4 | −12.5 | 2,240 | 37 | .10 |
| Bremerhaven, FRG | 5 | 9,109,046 | 87 | 10 | 3 | −1.2 | 19,152 | 40 | .96 |
| Cairo, Egypt | 2 | 1,587,268 | 95 | 0 | 5 | −0.8 | 4,476 | 30 | .17 |
| Chievres, Belgium | 3 | 5,371,224 | 84 | 11 | 5 | +1.8 | 10,609 | 42 | .57 |
| Crailsheim, FRG | 1 | 837,999 | 85 | 10 | 5 | −25.1 | 2,390 | 29 | .09 |
| Darmstadt, FRG | 3 | 5,767,075 | 86 | 11 | 3 | −5.5 | 15,341 | 31 | .61 |

*Europe Region/TSA continued on page 94*

/a Less than 0.1%.
N.C. No change.
N.A. Totals not meaningful for comparison purposes.

Store classes for Army commissaries are based upon total average monthly sales, as follows:

| | | | |
|---|---|---|---|
| Class 1 Up to $100,000 | Class 3 $300,001-$500,000 | Class 5 $750,001-$1,000,000 | Class 7 $1,500,001-$2,000,000 |
| Class 2 $100,001-$300,000 | Class 4 $500,001-$750,000 | Class 6 $1,000,001-$1,500,000 | Class 8 Over $2,000,000 |

**Notes:** All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY85 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data.

*Europe Region/TSA continued from page 92*

| | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Dhahran, Saudi Arabia | 2 | 1,600,462 | 91 | 0 | 9 | −21.6 | 4,960 | 27 | .17 |
| Erlangen, FRG | 2 | 1,908,742 | 89 | 8 | 3 | +2.4 | 2,140 | 74 | .20 |
| Frankfurt, FRG | 6 | 15,101,011 | 84 | 11 | 5 | −4.0 | 19,291 | 65 | 1.60 |
| Fuerth, FRG | 6 | 14,390,336 | 85 | 11 | 4 | +1.9 | 15,378 | 78 | 1.52 |
| Fulda, FRG | 3 | 3,709,053 | 85 | 12 | 3 | −4.0 | 6,718 | 46 | .39 |
| Garmisch, FRG | 1 | 946,404 | 85 | 9 | 6 | −13.4 | 3,315 | 24 | .10 |
| Gelnhausen, FRG | 2 | 3,531,374 | 88 | 8 | 4 | +11.2 | 9,071 | 32 | .37 |
| Giessen, FRG | 5 | 9,875,060 | 86 | 10 | 4 | /a | 20,123 | 41 | 1.05 |
| Goeppingen, FRG | 2 | 1,864,907 | 87 | 8 | 5 | +6.6 | 2,547 | 61 | .20 |
| Grafenwoehr, FRG | 3 | 4,506,944 | 85 | 10 | 5 | −6.6 | 8,403 | 45 | .48 |
| Hanau, FRG | 5 | 9,888,528 | 87 | 9 | 4 | −6.3 | 11,147 | 74 | 1.05 |
| Heidelberg, FRG | 6 | 12,262,201 | 83 | 12 | 5 | −3.4 | 18,910 | 54 | 1.30 |
| Heilbronn, FRG | 3 | 4,232,386 | 84 | 11 | 5 | −0.2 | 9,328 | 38 | .45 |
| Hohenfels, FRG | 1 | 1,070,016 | 88 | 9 | 3 | −3.9 | 3,390 | 26 | .11 |
| Idar Oberstein, FRG | 1 | 546,815 | 89 | 6 | 5 | −14.6 | 2,580 | 18 | .06 |
| Illesheim, FRG | 2 | 1,971,478 | 86 | 10 | 4 | −5.5 | 4,701 | 35 | .21 |
| Jidda, Saudi Arabia | 1 | 670,827 | 93 | 0 | 7 | −23.7 | 3,106 | 18 | .07 |
| Karlsruhe, FRG | 3 | 5,461,245 | 85 | 11 | 4 | −0.7 | 15,197 | 30 | .58 |
| Kelley Barracks, FRG | 2 | 3,219,587 | 84 | 11 | 5 | +1.8 | 9,465 | 28 | .34 |
| Kitzingen, FRG | 3 | 4,827,092 | 84 | 12 | 4 | +1.6 | 9,353 | 43 | .51 |
| Livorno, Italy | 2 | 2,346,952 | 84 | 11 | 5 | −4.0 | 5,540 | 35 | .25 |
| Ludwigsburg, FRG | 2 | 2,094,649 | 85 | 11 | 4 | +12.3 | 4,428 | 40 | .22 |
| Mainz, FRG | 3 | 4,374,338 | 85 | 11 | 4 | +13.0 | 2,990 | 122 | .46 |
| Mannheim, FRG | 5 | 10,721,144 | 84 | 12 | 4 | −9.9 | 9,277 | 96 | 1.14 |
| Munich, FRG | 3 | 4,860,804 | 81 | 13 | 6 | −7.7 | 10,580 | 38 | .51 |
| Neu Ulm, FRG | 2 | 3,567,718 | 84 | 13 | 3 | +0.7 | 5,717 | 52 | .38 |
| Patch Barracks, FRG | 3 | 5,325,416 | 82 | 13 | 5 | +1.4 | 4,464 | 99 | .56 |
| Pirmasens, FRG | 3 | 4,364,310 | 86 | 10 | 4 | −5.8 | 7,209 | 50 | .46 |
| Riyadh, Saudi Arabia | 2 | 3,314,856 | 92 | 0 | 8 | −18.7 | 4,507 | 61 | .35 |
| Robinson Barracks, FRG | 4 | 7,996,477 | 84 | 12 | 4 | −5.1 | 10,735 | 62 | .85 |
| Schinnen, NL | 3 | 4,052,145 | 84 | 13 | 3 | −4.1 | 11,053 | 31 | .43 |
| Schwaebisch Gmuend, FRG | 2 | 1,937,243 | 87 | 9 | 4 | +8.6 | 4,222 | 38 | .21 |
| Schwaebisch Hall, FRG | 1 | 925,242 | 85 | 10 | 5 | +1.1 | 3,816 | 20 | .10 |
| Vicenza, Italy | 3 | 5,026,478 | 85 | 10 | 5 | +1.8 | 3,732 | 112 | .53 |
| Wertheim, FRG | 1 | 1,173,520 | 87 | 9 | 4 | −13.2 | 3,617 | 27 | .12 |
| Weisbaden, FRG | 6 | 12,904,305 | 84 | 12 | 4 | −8.4 | 14,138 | 76 | 1.37 |
| Wildflecken, FRG | 2 | 2,573,053 | 88 | 8 | 4 | −1.0 | 5,272 | 41 | .27 |
| Worms, FRG | 2 | 2,382,023 | 83 | 12 | 5 | −0.7 | 7,125 | 28 | .25 |
| Wuerzburg, FRG | 4 | 6,283,378 | 86 | 10 | 4 | +3.8 | 8,100 | 65 | .67 |
| Zweibruecken, FRG | 3 | 4,718,389 | 84 | 11 | 5 | −1.1 | 9,430 | 42 | .50 |
| **Region Totals** | | **$278,503,374** | **85%** | **10%** | **5%** | **−2.7%** | **492,161** | **$47** | **29.50%** |

/a Less than 0.1%.
N.C. No change.
N.A. Totals not meaningful for comparison purposes.
Store classes for Army commissaries are based upon total average monthly sales, as follows:

| | | | |
|---|---|---|---|
| Class 1 Up to $100,000 | Class 3 $300,001-$500,000 | Class 5 $750,001-$1,000,000 | Class 7 $1,500,001-$2,000,000 |
| Class 2 $100,001-$300,000 | Class 4 $500,001-$750,000 | Class 6 $1,000,001-$1,500,000 | Class 8 Over $2,000,000 |

**Notes:** All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY85 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data.

# Marine Corps Commissary Sales—FY85

## CONUS

### East Coast Complex/USMC

| Store | Store Class | Total Store $ Sales | % of Store Total: Grocery | Meat | Produce | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| Hadnot Point, NC | 6 | 13,300,274 | 75 | 20 | 5 | +7.9 | 22,000 | 50 | .36 |
| Tarawa Terrace, NC | 6 | 14,115,356 | 75 | 20 | 5 | +11.8 | 24,756 | 48 | .39 |
| Cherry Point, NC | 6 | 16,369,772 | 80 | 15 | 5 | +6.4 | 18,655 | 73 | .45 |
| New River, NC | 2 | 3,094,610 | 77 | 19 | 4 | +17.1 | 6,344 | 41 | .08 |
| Parris Island, SC | 4 | 8,022,438 | 77 | 17 | 6 | +10.0 | 12,737 | 52 | .22 |
| **Complex Totals** | | **$54,902,450** | **77%** | **18%** | **5%** | **+9.2%** | **84,492** | **$54** | **1.50%** |

### West Coast Complex/USMC

| Store | Store Class | Total Store $ Sales | % of Store Total: Grocery | Meat | Produce | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| Barstow, CA | 2 | 2,874,080 | 77 | 17 | 6 | +5.6 | 6,283 | 38 | .08 |
| Camp Pendleton, CA | 7 | 20,911,878 | 74 | 19 | 7 | +5.2 | 26,240 | 66 | .57 |
| San Onofre, CA | 3 | 3,712,171 | 78 | 15 | 7 | +5.6 | 8,674 | 36 | .10 |
| El Toro, CA | 8 | 24,117,522 | 77 | 16 | 7 | +12.0 | 26,250 | 77 | .66 |
| Twentynine Palms, CA | 4 | 7,052,947 | 77 | 18 | 5 | −0.4 | 11,000 | 53 | .19 |
| Yuma, AZ | 4 | 6,076,187 | 78 | 16 | 6 | +10.0 | 12,630 | 40 | .17 |
| **Complex Totals** | | **$64,744,785** | **76%** | **17%** | **7%** | **+7.4%** | **91,077** | **$59** | **1.77%** |

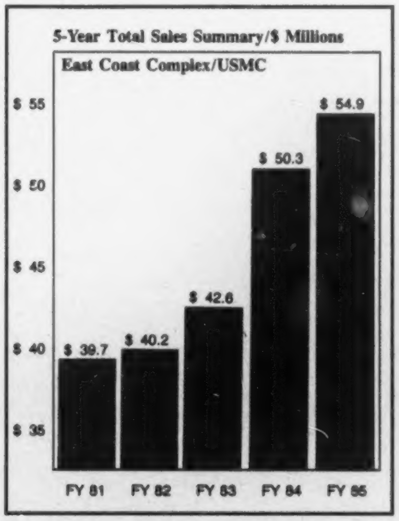
/a Less than 0.1%.
N.A. Totals not meaningful for comparison purposes.

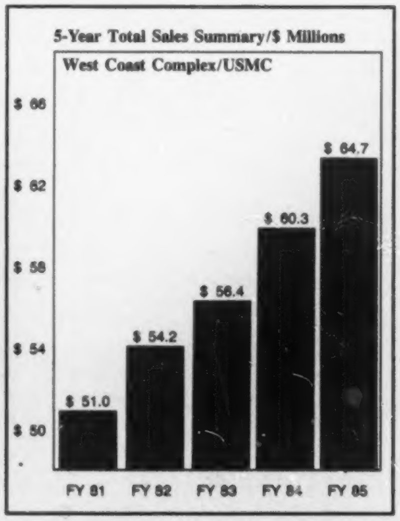
Store classes for Marine Corps commissaries are based upon total average monthly sales, as follows:

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Class 1 | Up to $100,000 | Class 3 | $300,001-$500,000 | Class 5 | $750,001-$1,000,000 | Class 7 | $1,500,001-$2,000,000 |
| Class 2 | $100,001-$300,000 | Class 4 | $500,001-$750,000 | Class 6 | $1,000,001-$1,500,000 | Class 8 | Over $2,000,000 |

**Notes:** All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY85 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data.

● *Interservice.*





## It's A Fact!

Marine Corps commissaries bucked the general trend of declining sales in FY85. Only two stores reported total store sales declines—29 Palms, CA and Albany, GA. The declines of each were less than 1.5 percent. By just how much did the Marines buck the trend? Their 13 remaining comstores each reported total store sales increases of at least 5 percent!

# Marine Corps Commissary Sales—FY85

## Stand-Alone Stores/USMC

| Store | Store Class | Total Store $ Sales | % of Store Total<br>Grocery | <br>Meat | <br>Produce | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| Albany, GA | 3 | 5,319,306 | 77 | 18 | 5 | −1.4 | 15,325 | 29 | .15 |
| Quantico, VA | 7 | 22,645,151 | 76 | 19 | 5 | +6.6 | 21,300 | 89 | .62 |
| **Stand-Alone Stores' Totals** | | **$27,964,457** | **N.A.** | **N.A.** | **N.A.** | **N.A.** | **36,625** | **$64** | **.77%** |
| **CONUS Totals/USMC** | | **$147,611,692** | **77%** | **18%** | **5%** | **+7.7%** | **212,194** | **$58** | **4.00%** |

/a Less than 0.1%.
N.A. Totals not meaningful for comparison purposes.

Store classes for Marine Corps commissaries are based upon total average monthly sales, as follows:
Class 1 Up to $100,000 Class 3 $300,001-$500,000 Class 5 $750,001-$1,000,000 Class 7 $1,500,001-$2,000,000
Class 2 $100,001-$300,000 Class 4 $500,001-$750,000 Class 6 $1,000,001-$1,500,000 Class 8 Over $2,000,000

**Notes:** All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY85 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data.

# Marine Corps Commissary Coupon Redemptions—FY85

## CONUS

| Store | Number | % Share CONUS | % Share Worldwide | $ Value | % Share CONUS | % Share Worldwide |
|---|---|---|---|---|---|---|
| Albany, GA | 218,397 | 4.2 | 4.0 | 61,911 | 4.2 | 4.0 |
| Barstow, CA | 73,863 | 1.4 | 1.4 | 25,639 | 1.8 | 1.7 |
| Camp Pendleton, CA | 649,805 | 12.6 | 12.0 | 189,998 | 13.0 | 12.4 |
| Cherry Point, NC | 472,526 | 9.2 | 8.7 | 132,781 | 9.1 | 8.6 |
| El Toro, CA | 967,451 | 18.9 | 17.9 | 279,318 | 19.1 | 18.2 |
| Hadnot Point, NC | 435,120 | 8.5 | 8.0 | 122,815 | 8.4 | 8.0 |
| New River, NC | 72,247 | 1.4 | 1.3 | 20,702 | 1.4 | 1.4 |
| Parris Island, SC | 248,885 | 4.8 | 4.6 | 69,640 | 4.8 | 4.5 |
| Quantico, VA | 1,101,237 | 21.4 | 20.3 | 301,519 | 20.6 | 19.6 |
| San Onofre, CA | 108,321 | 2.1 | 2.0 | 30,905 | 2.1 | 2.0 |
| Tarawa Terrace, NC | 465,361 | 9.0 | 8.6 | 131,059 | 9.0 | 8.5 |
| Twentynine Palms, CA | 170,458 | 3.3 | 3.2 | 49,073 | 3.4 | 3.2 |
| Yuma, AZ | 133,026 | 2.6 | 2.5 | 36,907 | 2.5 | 2.4 |
| **CONUS Totals** | **5,151,760** | **100.0%** | **95.1%** | **$1,462,559** | **100.0%** | **95.2%** |

## Overseas

| Store | Number | % Share Overseas | % Share Worldwide | $ Value | % Share Overseas | % Share Worldwide |
|---|---|---|---|---|---|---|
| Iwakuni, Japan | 27,678 | 10.4 | .5 | 7,031 | 9.6 | .5 |
| Kaneohe Bay, HI | 239,575 | 89.6 | 4.4 | 66,627 | 93.4 | 4.3 |
| **Overseas Totals** | **267,253** | **100.0** | **4.9** | **73,658** | **100.0** | **4.8** |
| **Worldwide Totals** | **5,419,013** | **–** | **100.0%** | **$1,536,217** | **–** | **100.0%** |

*Continued from page 54*

| Rank | Store/Parent Organization | Avg. Mo. Sales/SF |
|---|---|---|
| 43 | Ft. Benning, GA/TSA | 98 |
| 44 | Travis AFB, CA/AFCOMS | 98 |
| *45* | *Kobbe/Howard, Panama/TSA* | *98* |
| 46 | Ft. Gordon, GA/TSA | 97 |
| 47 | Selfridge ANG, MI/TSA | 97 |
| 48 | Patrick AFB, FL/AFCOMS | 97 |
| 49 | Randolph AFB, TX/AFCOMS | 96 |
| *50* | *Mannheim, FRG/TSA* | *96* |
| 51 | Miramar, CA/Navy | 96 |
| *52* | *Taegu, Korea/TSA* | *95* |
| 53 | Peterson AFB, CO/AFCOMS | 94 |
| 54 | Ft. Meade, MD/TSA | 93 |
| 55 | Ft. Myer, VA/TSA | 93 |
| 56 | Kirtland AFB, NM/AFCOMS | 93 |
| 57 | San Diego NS, CA/Navy | 93 |
| 58 | Ft. Drum, NY/TSA | 92 |
| 59 | Ft. Polk, LA/TSA | 92 |
| 60 | McGuire AFB, NJ/AFCOMS | 92 |
| 61 | Fairchild AFB, WA/AFCOMS | 92 |
| 62 | Luke AFB, AZ/AFCOMS | 92 |
| 63 | Little Creek, VA/Navy | 92 |
| 64 | Ft. Devens, MA/TSA | 91 |
| 65 | Beale AFB, CA/AFCOMS | 91 |
| 66 | Quantico, VA/USMC | 89 |
| 67 | Norton AFB, CA/AFCOMS | 89 |
| 68 | Ft. Rucker, AL/TSA | 88 |
| 69 | Mather AFB, CA/AFCOMS | 88 |
| 70 | Hurlburt Field, FL/AFCOMS | 88 |
| 71 | Scott AFB, IL/AFCOMS | 88 |
| 72 | Shaw AFB, SC/AFCOMS | 88 |
| 73 | New London, CT/Navy | 88 |
| 74 | Ft. Leavenworth, KS/TSA | 87 |
| 75 | Mayport, FL/Navy | 87 |
| *76* | *Naples, Italy/Navy* | *87* |
| 77 | Ft. Knox, KY/TSA | 86 |
| 78 | Redstone Arsenal, AL/TSA | 86 |
| 79 | Little Rock AFB, AR/ AFCOMS | 86 |
| 80 | Wright-Patterson AFB, OH/ AFCOMS | 86 |
| 81 | Ft. McClellan, AL/TSA | 85 |
| 82 | North Island, CA/Navy | 85 |
| 83 | Ft. Gillem, GA/TSA | 84 |
| 84 | Ft. Ben Harrison, IN/TSA | 83 |
| 85 | Ft. Leonard Wood, MO/TSA | 83 |
| 86 | Charleston AFB, SC/AFCOMS | 83 |
| 87 | USAF Academy, CO/ AFCOMS | 83 |
| *88* | *RAF Lakenheath, UK/ AFCOMS* | *83* |
| 89 | Cameron Station, VA/TSA | 82 |
| 90 | Ft. Hamilton, NY/TSA | 82 |
| 91 | England AFB, LA/AFCOMS | 82 |
| 92 | Offutt AFB, NE/AFCOMS | 82 |
| 93 | Whidbey Island, WA/Navy | 82 |
| 94 | Ft. Sill, OK/TSA | 81 |
| 95 | George AFB, CA/AFCOMS | 81 |
| 96 | Keesler AFB, MS/AFCOMS | 81 |
| 97 | Vint Hill Farms, VA/TSA | 80 |
| 98 | Walter Reed AMC, DC/TSA | 79 |
| 99 | Lowry AFB, CO/AFCOMS | 79 |
| *100* | *Andersen AFB, Guam/ AFCOMS* | *79* |
| *101* | *Yokota AB, Japan/AFCOMS* | *79* |
| 102 | Ft. Monroe, VA/TSA | 78 |
| *103* | *Schofield Barracks, HI/TSA* | *78* |
| *104* | *Ft. Wainwright, AK/TSA* | *78* |
| *105* | *Fuerth, FRG/TSA* | *78* |
| 106 | Memphis, TN/Navy | 78 |
| 107 | El Toro, CA/USMC | 77 |
| 108 | Altus AFB, OK/AFCOMS | 77 |
| 109 | Myrtle Beach AFB, SC/ AFCOMS | 77 |
| *110* | *Osan AB, Korea/AFCOMS* | *77* |
| 111 | Charleston NWS, SC/Navy | 77 |
| 112 | Pensacola, FL/Navy | 77 |
| *113* | *Eielson AFB, AK/AFCOMS* | *76* |
| *114* | *Weisbaden, FRG/TSA* | *76* |
| 115 | Griffiss AFB, NY/AFCOMS | 75 |
| 116 | Carswell AFB, TX/AFCOMS | 75 |
| 117 | Newport, RI/Navy | 75 |
| 118 | Seymour Johnson AFB, NC/ AFCOMS | 74 |
| *119* | *Erlangen, FRG/TSA* | *74* |
| *120* | *Hanau, FRG/TSA* | *74* |
| *121* | *Kaneohe Bay, HI/USMC* | *74* |
| 122 | Cherry Point, NC/USMC | 73 |
| 123 | Ft. Sheridan, IL/TSA | 73 |
| 124 | Hill AFB, UT/AFCOMS | 73 |
| 125 | Long Beach, CA/Navy | 73 |
| *126* | *Barbers Point, HI/Navy* | *73* |
| 127 | March AFB, CA/AFCOMS | 72 |
| 128 | Bolling AFB, DC/AFCOMS | 72 |
| 129 | Dyess AFB, TX/AFCOMS | 71 |
| *130* | *Elmendorf AFB, AK/AFCOMS* | *71* |
| *131* | *Holy Loch, Scotland/Navy* | *71* |
| *132* | *Ramstein AB, FRG/AFCOMS* | *70* |
| 133 | Aberdeen Prov. Grnds., MD/ TSA | 69 |
| 134 | Ft. Eustis, VA/TSA | 69 |

*Continued on page 110*

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ALFRED M. **LEWIS** INCORPORATED

# Marine Corps Commissary Sales—FY85 OVERSEAS

## Overseas/USMC

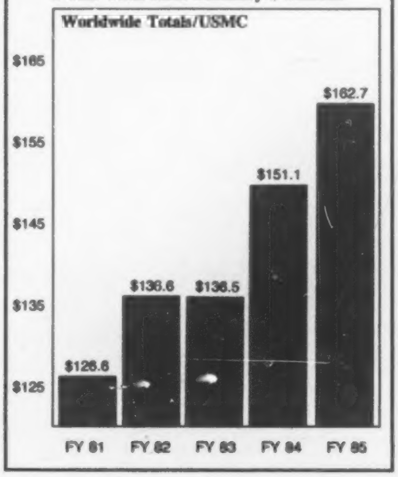
| Store | Store Class | Total Store $ Sales | % of Store Total Grocery | % of Store Total Meat | % of Store Total Produce | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| Iwakuni, Japan | 2 | 2,824,384 | 84 | 13 | 3 | +17.1 | 5,010 | 47 | .30 |
| Kaneohe Bay, HI | 6 | 12,252,941 | 77 | 16 | 7 | +6.9 | 13,800 | 74 | 1.30 |
| **Overseas USMC Totals** | | **$15,077,324** | **78%** | **15%** | **7%** | **+8.7%** | **18,810** | **$67** | **1.60%** |
| **Worldwide USMC Totals** | | **$162,689,016** | **77%** | **18%** | **5%** | **+7.7%** | **231,004** | **$59** | **3.54%** |

/a Less than 0.1%.
N.A. Totals not meaningful for comparison purposes.

Store classes for Marine Corps commissaries are based upon total average monthly sales, as follows:
Class 1 Up to $100,000
Class 2 $100,001-$300,000
Class 3 $300,001-$500,000
Class 4 $500,001-$750,000
Class 5 $750,001-$1,000,000
Class 6 $1,000,001-$1,500,000
Class 7 $1,500,001-$2,000,000
Class 8 Over $2,000,000

**Notes:** All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY85 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data.

**5-Year Total Sales Summary/$ Millions**



## It's A Fact!

Can you name the top 20 CONUS and overseas military commissaries with the largest total square feet of sales area? They are:

CONUS

1. **Carswell AFB, TX** (*50,000*)
2. Lackland AFB, TX (*43,870*)
3. Ft. Bragg, NC (*42,134*)
4. Wright-Patterson AFB, OH (*39,750*)
5. McGuire AFB, NJ (*39,444*)
6. Miramar, CA (*38,600*)
7. Ft. Hood, TX (*36,551*)
8. Little Creek, VA (*35,912*)
9. Lowry AFB, CO (*35,413*)
10. McClellan AFB, TX (*35,000*)
11. Randolph AFB, TX (*33,628*)
12. McChord AFB, WA (*32,979*)
13. Ft. Sill, OK (*32,951*)
14. Ft. Benning, GA (*32,729*)
15. San Diego NS, CA (*32,590*)
16. Ft. Bliss, TX (*32,538*)
17. Offutt AFB, NE (*32,205*)
18. Cameron Station, VA (*31,616*)
19. Hanscom AFB, MA (*31,125*)
20. Ft. Knox, KY (*31,025*)

Overseas

1. Schofield Barracks, HI (*31,452*)
2. Elmendorf AFB, AK (*31,129*)
3. Yongsan, Korea (*29,387*)
4. Kadena AB, JA (*29,225*)
5. Pearl Harbor, HI (*24,641*)
6. Ramstein AB, FRG (*24,616*)
7. Clark AB, PI (*23,128*)
8. Hickam AFB, HI (*22,144*)
9. Misawa AB, JA (*21,151*)
10. Osan AB, Korea (*20,250*)
11. Giessen, FRG (*20,123*)
12. Frankfurt, FRG (*19,291*)
13. Bremerhaven, FRG (*19,152*)
14. Heidelberg, FRG (*18,910*)
15. Ft. Buchanan, PR (18,084)
16. Berlin (Free Zone), FRG (*17,352*)
17. Vogelweh, FRG (*17,349*)
18. Sagamihara, JA (*16,792*)
19. Butler, JA (*16,100*)
20. Torrejon AB, Spain (*15,893*)

# Navy Commissary Sales—FY85

## Auburn Division/Navy

| Store | Store Class | Total Store $ Sales | % of Store Total: Grocery | % of Store Total: Meat | % of Store Total: Produce | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| Bangor, WA | 5 | 11,641,863 | 77 | 16 | 7 | +12.6 | 22,000 | 44 | .32 |
| Bremerton, WA | 5 | 91,198,727 | 75 | 17 | 8 | +2.1 | 12,352 | 62 | .25 |
| Seattle, WA | 6 | 16,591,449 | 75 | 18 | 7 | −2.4 | 13,500 | 102 | .45 |
| Whidbey Island, WA | 6 | 12,193,366 | 76 | 16 | 8 | +4.5 | 12,354 | 82 | .33 |
| **Division Totals** | | **$131,625,405** | **76%** | **17%** | **7%** | **+3.3%** | **60,206** | **$69** | **1.36%** |

## Corpus Christi Region/Navy

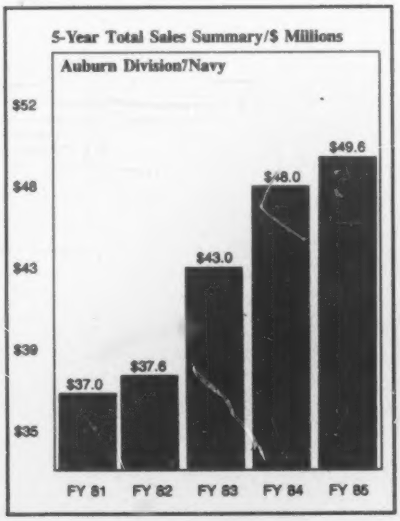
| Store | Store Class | Total Store $ Sales | % of Store Total: Grocery | % of Store Total: Meat | % of Store Total: Produce | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| Beeville, TX | 2 | 2,026,128 | 77 | 17 | 6 | −1.7 | 5,464 | 31 | .06 |
| Corpus Christi, TX | 4 | 7,616,125 | 75 | 18 | 7 | +4.6 | 14,024 | 45 | .21 |
| Kingsville, TX | 2 | 2,036,032 | 77 | 18 | 5 | +7.8 | 6,700 | 25 | .06 |
| **Region Totals** | | **$11,678,285** | **76%** | **17%** | **7%** | **+4.0** | **26,188** | **$37** | **.32%** |

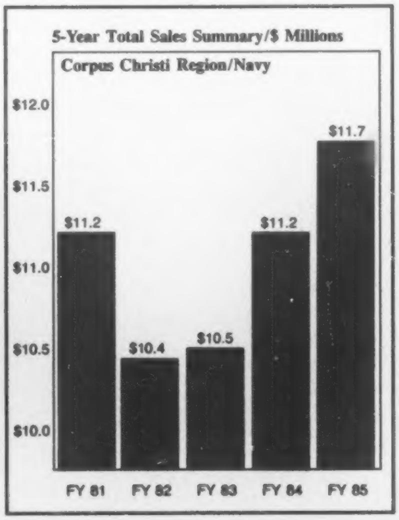
/a Less than 0.1%.
N.A. Totals not meaningful for comparison purposes.

Store classes for Navy commissaries are based upon total average monthly sales, as follows:

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Class 1 | Up to $100,000 | Class 3 | $300,001-$500,000 | Class 5 | $750,001-$1,000,000 | Class 7 | $1,500,001-$2,000,000 |
| Class 2 | $100,001-$300,000 | Class 4 | $500,001-$750,000 | Class 6 | $1,000,001-$1,500,000 | Class 8 | Over $2,000,000 |

**Notes:** All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY85 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data.





## It's A Fact!

Do you know which are the top ten overseas military commissaries with the largest, single-store square feet of sales area? They are:

1. Schofield Barracks, HI (*31,452*)
2. Elmendorf AFB, AK (*31,129*)
3. Yongsan, Korea (*29,387*)
4. Kadena AB, Japan (*29,225*)
5. Pearl Harbor, HI (*24,641*)
6. Ramstein AB, FRG (*24,616*)
7. Clark AB, PI (*23,128*)
8. Hickam AFB, HI (*22,144*)
9. Misawa AB, Japan (*21,151*)
10. Osan AB, Korea (*20,250*)

# Navy Commissary Sales—FY85

## Davisville Division/Navy

| Store | Store Class | Total Store $ Sales | % of Store Total Grocery | % of Store Total Meat | % of Store Total Produce | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| Brunswick, ME | 4 | 7,818,976 | 78 | 16 | 6 | +11.5 | 11,662 | 59 | .21 |
| Cutler, ME | 1 | 626,647 | 76 | 18 | 6 | +3.1 | 2,252 | 75 | .02 |
| New London, CT | 7 | 22,803,530 | 75 | 17 | 8 | /a | 21,685 | 88 | .62 |
| Newport, RI | 6 | 12,989,892 | 74 | 19 | 7 | +4.3 | 14,346 | 75 | .36 |
| Scotia, NY | 2 | 2,973,311 | 76 | 19 | 5 | −2.9 | 8,200 | 30 | .08 |
| Winter Harbor, ME | 1 | 735,389 | 78 | 16 | 6 | +2.4 | 1,876 | 33 | .02 |
| **Division Totals** | | **$47,947,745** | **75%** | **18%** | **7%** | **+2.8%** | **60,021** | **$67** | **1.31%** |

## Great Lakes Region/Navy

| Store | Store Class | Total Store $ Sales | % of Store Total Grocery | % of Store Total Meat | % of Store Total Produce | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| Crane, IN | 1 | 523,417 | 81 | 16 | 3 | −3.3 | 2,650 | 16 | .01 |
| Great Lakes, IN | 6 | 15,150,170 | 76 | 18 | 6 | −0.8 | 18,700 | 68 | .41 |
| **Region Totals** | | **$15,673,587** | **76%** | **18%** | **6%** | **−0.9%** | **21,350** | **$61** | **.43%** |

/a Less than 0.1%.
N.A. Totals not meaningful for comparison purposes.

Store classes for Navy commissaries are based upon total average monthly sales, as follows:
Class 1 Up to $100,000
Class 2 $100,001–$300,000
Class 3 $300,001–$500,000
Class 4 $500,001–$750,000
Class 5 $750,001–$1,000,000
Class 6 $1,000,001–$1,500,000
Class 7 $1,500,001–$2,000,000
Class 8 Over $2,000,000

**Notes:** All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY85 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data.

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CABLE ADDRESS: CALPACIFIC

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AMERICAN LOGISTICS ASSOCIATION

## It's A Fact!

Do you know which are the ten overseas military commissaries with the highest FY85 total store sales increase? They are:

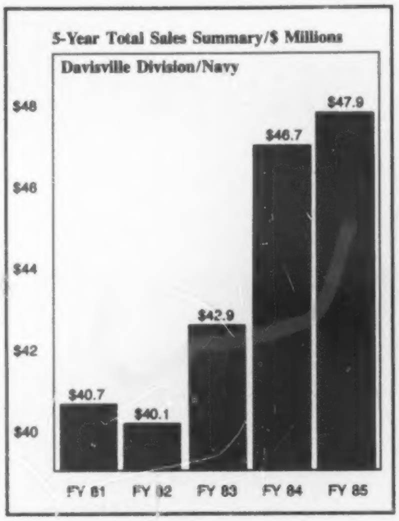
1. Kobbe/Howard, Panama (+*38.5*)
2. Corozal, Panama (+*31.7*)
3. Hellenikon Br., Greece (+*31.7*)
4. Subic Bay, PI (+*18.2*)
5. Iwakuni, Japan (+*17.1*)
6. Atsugi, Japan (+*16.9*)
7. Incirlik, Turkey (+*16.6*)
8. Misawa AB, Japan (+*15.5*)
9. Sasebo, Japan (+*15.3*)
10. Bad Kreuznach, FRG (+*13.2*)

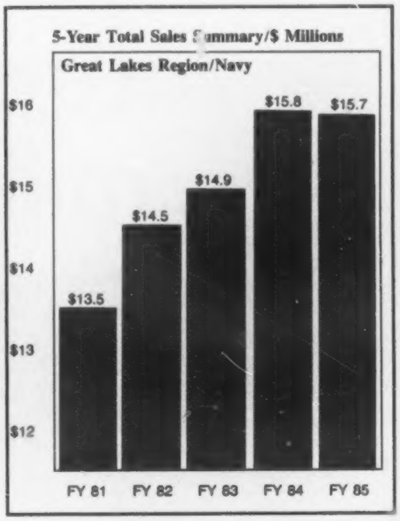
# Navy Commissary Sales—FY85

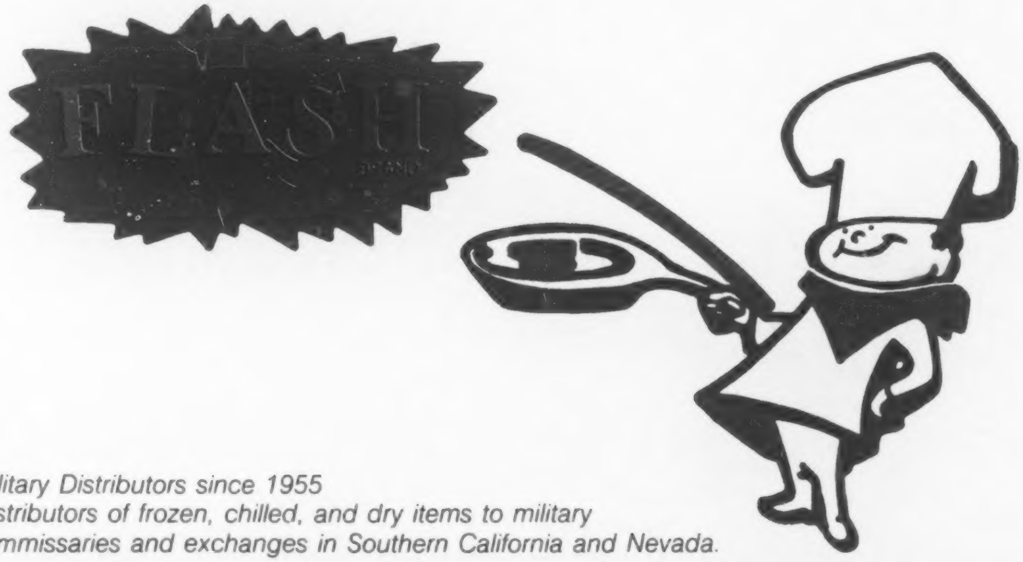
## It's A Fact!

Do you know which are the ten CONUS military commissaries with the highest FY85 total store sales increase? They are:

1. Avon Park Range, FL (+*75.5*)
2. New River, NC (+*17.1*)
3. Fallon, NV (+*14.3*)
4. Gila Bend AF, AZ (+*13.5*)
5. Holbrook AFB, AZ (+*12.3*)
6. El Toro, CA (+*12.0*)
7. Tarawa Terrace, NC (+*11.8*)
8. McClellan AFB, CA (+*11.1*)
9. Ft. Irwin, CA (+*10.1*)
10. Parris Island, SC (+*10.0*)







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**FLASH STEAK COMPANY, INC.**

*7959 Paramount Boulevard, Pico Rivera, CA 90660 (213) 949-2558 Contact: Chris M. Sanchez (15)*

# Navy Commissary Sales—FY85

## Jacksonville Group/Navy

| Store | Store Class | Total Store $ Sales | % of Store Total Grocery | Meat | Produce | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| Athens, GA | 2 | 2,332,107 | 76 | 18 | 6 | +0.4 | 4,400 | 44 | .06 |
| Cecil Field, FL | 4 | 6,929,389 | 73 | 22 | 5 | +5.3 | 10,226 | 56 | .19 |
| Charleston NS, SC | 5 | 10,102,602 | 81 | 14 | 5 | +3.0 | 25,727 | 33 | .28 |
| Charleston NWS, SC | 5 | 9,792,899 | 81 | 13 | 6 | +1.8 | 10,540 | 77 | .27 |
| Jacksonville, FL | 8 | 26,994,414 | 76 | 18 | 6 | −0.3 | 19.728 | 114 | .74 |
| Key West, FL | 3 | 4,513,795 | 75 | 18 | 7 | −0.8 | 9,139 | 41 | .12 |
| Kings Bay, GA | 2 | 608,548 | 78 | 16 | 6 | /a | 17,000 | 3 | .02 |
| Mayport, FL | 6 | 12,149,624 | 75 | 19 | 6 | +10.8 | 11,700 | 87 | .33 |
| Orlando, FL | 7 | 21,677,079 | 74 | 20 | 6 | −0.3 | 30,155 | 60 | .59 |
| **Group Totals** | | **$95,100,457** | **76%** | **18%** | **6%** | **+2.6%** | **138,615** | **$57** | **2.60%** |

## Norfolk Group/Navy

| Store | Store Class | Total Store $ Sales | % of Store Total Grocery | Meat | Produce | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| Little Creek, VA | 8 | 39,615,459 | 76 | 17 | 7 | +5.3 | 35,912 | 92 | 1.08 |
| Norfolk, VA | 6 | 17,220,630 | 78 | 17 | 5 | −2.1 | 25,711 | 56 | .47 |
| Oceana, VA | 8 | 28,283,490 | 77 | 17 | 6 | +1.4 | 23,839 | 99 | .77 |
| Portsmouth, VA | 6 | 12,848,388 | 77 | 18 | 5 | −1.1 | 21,346 | 50 | .35 |
| Yorktown, VA | 2 | 2,935,063 | 73 | 20 | 7 | +2.0 | 7,056 | 35 | .08 |
| **Group Totals** | | **$100,903,030** | **76%** | **17%** | **7%** | **+2.0%** | **113,864** | **$74** | **2.76%** |

## Oakland Division/Navy

| Store | Store Class | Total Store $ Sales | % of Store Total Grocery | Meat | Produce | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| Alameda, CA | 6 | 17,291,647 | 75 | 20 | 5 | +1.1 | 22,835 | 63 | .47 |
| Fallon, NV | 2 | 1,979,566 | 81 | 15 | 4 | +14.3 | 4,000 | 41 | .05 |
| Lemoore, CA | 4 | 8,192,948 | 81 | 15 | 4 | +1.3 | 16,870 | 40 | .22 |
| Mare Island, CA | 5 | 10,999,328 | 75 | 18 | 7 | +3.6 | 16,840 | 54 | .30 |
| Moffett Field, CA | 8 | 26,663,351 | 74 | 20 | 6 | +2.2 | 18,280 | 122 | .73 |
| Novato (Hamilton), CA | 5 | 9,819,656 | 76 | 17 | 7 | +4.9 | 19,500 | 42 | .27 |
| Stockton, CA | 2 | 3,491,006 | 78 | 18 | 4 | +3.5 | 7,422 | 39 | .10 |
| Treasure Island, CA | 3 | 3,821,754 | 75 | 18 | 7 | −1.9 | 9,696 | 33 | .10 |
| **Division Totals** | | **$82,259,256** | **76%** | **19%** | **5%** | **+2.5%** | **115,443** | **$59** | **2.25%** |

/a Less than 0.1%.

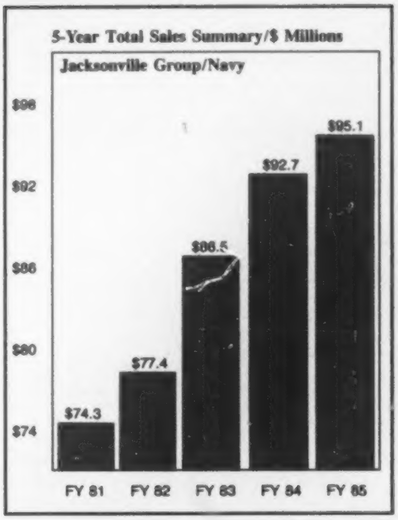
N.A. Totals not meaningful for comparison purposes.

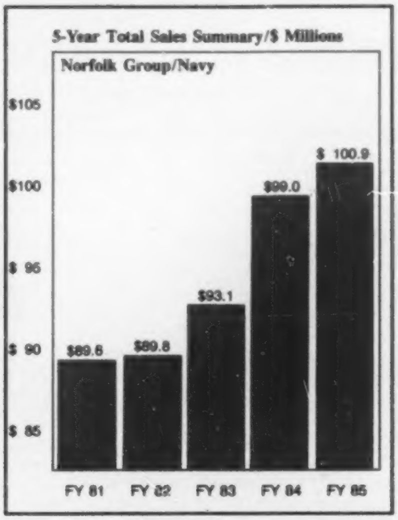
Store classes for Navy commissaries are based upon total average monthly sales, as follows:

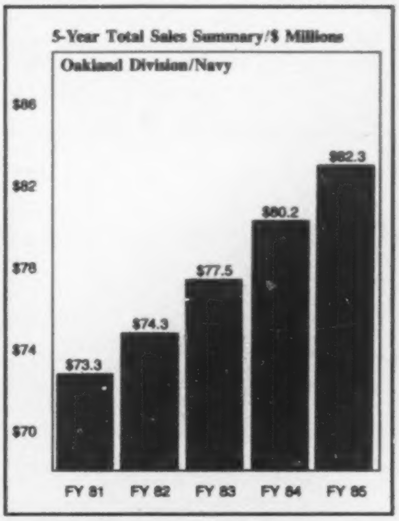
| | |
|---|---|
| Class 1 | Up to $100,000 |
| Class 2 | $100,001-$300,000 |
| Class 3 | $300,001-$500,000 |
| Class 4 | $500,001-$750,000 |
| Class 5 | $750,001-$1,000,000 |
| Class 6 | $1,000,001-$1,500,000 |
| Class 7 | $1,500,001-$2,000,000 |
| Class 8 | Over $2,000,000 |

**Notes:** All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY85 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data.

# Navy Commissary Sales—FY85







## Patuxent River Region/Navy

| Store | Store Class | Total Store $ Sales | % of Store Total<br>Grocery | Meat | Produce | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| Annapolis, MD | 4 | 8,502,007 | 73 | 20 | 7 | +1.1 | 13,374 | 53 | .23 |
| Dahlgren, VA | 1 | 1,032,481 | 77 | 18 | 5 | +6.4 | 4,593 | 19 | .03 |
| Lakehurst, NJ | 2 | 2,801,515 | 72 | 21 | 7 | +9.0 | 5,075 | 46 | .08 |
| Mitchel Field, NY | 4 | 7,481,388 | 73 | 20 | 7 | +2.4 | 12,290 | 51 | .20 |
| Patuxent, MD | 4 | 6,993,063 | 77 | 17 | 6 | +3.5 | 9,406 | 62 | .19 |
| Philadelphia, PA | 4 | 8,987,247 | 73 | 20 | 7 | −0.8 | 17,502 | 43 | .25 |
| **Regional Totals** | | **$35,797,701** | **74%** | **19%** | **7%** | **+2.1%** | **62,240** | **$48** | **+.98%** |

## Pensacola Region/Navy

| Store | Store Class | Total Store $ Sales | % of Store Total<br>Grocery | Meat | Produce | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| Gulfport, MS | 3 | 5,178,161 | 77 | 17 | 6 | +13.2 | 10,076 | 43 | .14 |
| Memphis, TN | 6 | 16,480,374 | 77 | 18 | 5 | +0.2 | 17,600 | 78 | .45 |
| Meridian, MS | 3 | 4,220,874 | 77 | 18 | 5 | +0.9 | 8,702 | 40 | .12 |
| New Orleans, LA | 5 | 10,390,440 | 76 | 18 | 6 | +5.7 | 15,458 | 56 | .28 |
| Pensacola, FL | 7 | 20,942,492 | 76 | 17 | 7 | −1.2 | 22,720 | 77 | .57 |
| Whiting Field, FL | 3 | 3,897,223 | 77 | 17 | 6 | +1.8 | 7,870 | 41 | .11 |
| **Regional Totals** | | **$61,109,564** | **77%** | **17%** | **6%** | **+1.8%** | **82,426** | **$623** | **1.67%** |

/a Less than 0.1%.
N.A. Totals not meaningful for comparison purposes.

Store classes for Navy commissaries are based upon total average monthly sales, as follows:

| | |
|---|---|
| Class 1 | Up to $100,000 |
| Class 2 | $100,001-$300,000 |
| Class 3 | $300,001-$500,000 |
| Class 4 | $500,001-$750,000 |
| Class 5 | $750,001-$1,000,000 |
| Class 6 | $1,000,001-$1,500,000 |
| Class 7 | $1,500,001-$2,000,000 |
| Class 8 | Over $2,000,000 |

**Notes:** All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY85 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data.

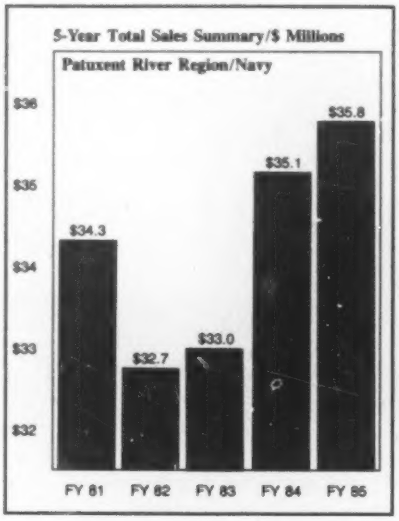
• *Interservice.*

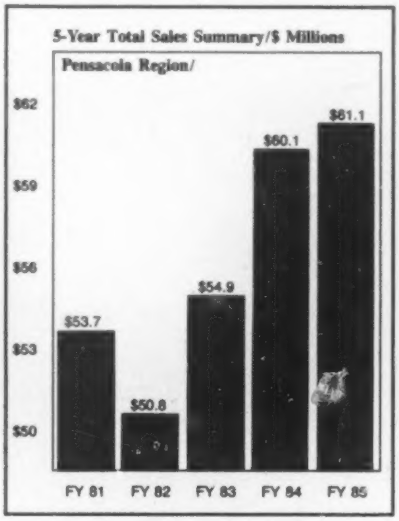
# Navy Commissary Sales—FY85

**It's A Fact!**

Do you know which are the top ten CONUS military commissaries with the largest, single-store square feet of sales area? They are:

1. Carswell AFB, TX *(50,000)*
2. Lackland AFB, TX *(43,870)*
3. Ft. Bragg, NC *(42,134)*
4. Wright-Patterson AFB, OH *(39,750)*
5. McGuire AFB, NJ *(39,444)*
6. Miramar, CA *(38,600)*
7. Ft. Hood, TX *(36,551)*
8. Little Creek, VA *(35,912)*
9. Lowry AFB, CO *(35,413)*
10. McClellan AFB, CA *(35,000)*





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Cigars
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Dutch Masters.
CIGARS
MURIEL CIGARS

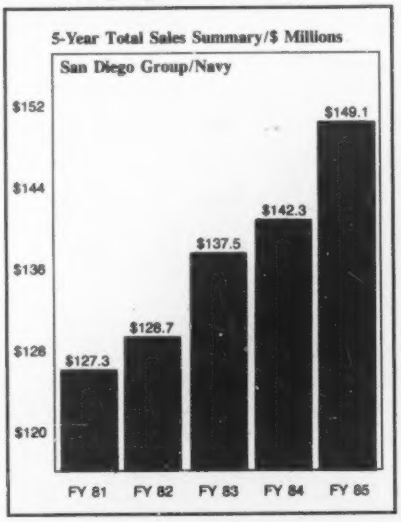
Consolidated Cigar Corporation

# Navy Commissary Sales—FY85

*continued from page 100*

| Rank | Store/Parent Organization | Avg. Mo. Sales/SF |
|---|---|---|
| 135 | Lackland AFB, TX/AFCOMS | 69 |
| *136* | *Augsburg, FRG/TSA* | *69* |
| 137 | Port Hueneme, CA/Navy | 69 |
| 138 | Lexington, KY/TSA | 69 |
| 139 | Ft. Huachuca, AZ/TSA | 68 |
| 140 | Ft. Riley, KS/TSA | 68 |
| 141 | Great Lakes, IN/Navy | 68 |
| 142 | Carlisle Barracks, PA/TSA | 67 |
| 143 | Presidio of San Francisco, CA/TSA | 67 |
| *144* | *Roosevelt Roads, PR/Navy* | *67* |
| 145 | Camp Pendleton, CA/USMC | 66 |
| 146 | Castle AFB, CA/AFCOMS | 66 |
| 147 | Williams AFB, AZ/AFCOMS | 66 |
| *148* | *Vogelweh, FRG/AFCOMS* | *66* |
| 149 | Mt. Home AFB, ID/AFCOMS | 65 |
| *150* | *Frankfurt, FRG/TSA* | *65* |
| *151* | *Wuerzburg, FRG/TSA* | *65* |
| *152* | *Sigonella, Italy/Navy* | *65* |
| 153 | McClellan AFB, CA/AFCOMS | 64 |
| *154* | *Kadena AB, Okinawa/AFCOMS* | *64* |
| 155 | Ft. Lee, VA/TSA | 63 |
| 156 | Ft. Monmouth, NJ/TSA | 63 |
| 157 | Gunter AFB, AL/AFCOMS | 63 |
| 158 | Ellsworth AFB, SD/AFCOMS | 63 |
| 159 | Pease AFB, NH/AFCOMS | 63 |
| *160* | *Butler, Okinawa/AFCOMS* | *63* |
| 161 | Alameda, CA/Navy | 63 |
| 162 | F.E. Warren AFB, WY/AFCOMS | 63 |
| 163 | Vandenberg AFB, CA/AFCOMS | 62 |
| 164 | Brooks AFB, TX/AFCOMS | 62 |
| 165 | Sheppard AFB, TX/AFCOMS | 62 |
| *166* | *Robinson Barracks, FRG/TSA* | *62* |
| 167 | Bremerton, WA/Navy | 62 |
| 168 | Patuxent, MD/Navy | 62 |
| 169 | Granite City AD, IL/TSA | 61 |
| 170 | Dover AFB, DE/AFCOMS | 61 |
| *171* | *Hahn AB, FRG/AFCOMS* | *61* |
| *172* | *Goeppingen, FRG/TSA* | *61* |
| *173* | *Riyadh, Saudi Arabia/TSA* | *61* |
| 174 | Ft. Irwin, CA/TSA | 60 |
| 175 | Blytheville AFB, AR/AFCOMS | 60 |
| 176 | Minot AFB, ND/AFCOMS | 60 |
| 177 | Orlando, FL/Navy | 60 |
| 178 | Brunswick, ME/Navy | 59 |
| 179 | Ft. McPherson, GA/TSA | 58 |
| 180 | Stewart ASE, NY/TSA | 58 |
| *181* | *Bermuda/Navy* | *58* |
| 182 | Seneca AD, NY/TSA | 57 |
| 183 | Tyndall AFB, FL/AFCOMS | 57 |
| 184 | Malmstrom AFB, MT/AFCOMS | 57 |
| 185 | Goodfellow AFB, TX/AFCOMS | 57 |
| *186* | *Lajes Field, Azores/AFCOMS* | *57* |
| 187 | China Lake, CA/Navy | 57 |
| 188 | Robins AFB, GA/AFCOMS | 57 |
| 189 | Cecil Field, FL/Navy | 56 |
| 190 | Norfolk, VA/Navy | 56 |
| 191 | New Orleans, LA/Navy | 56 |
| 192 | Maxwell AFB, AL/AFCOMS | 55 |
| *193* | *Spangdahlem AB, FRG/AFCOMS* | *55* |
| *194* | *RAF Upper Heyford, UK/AFCOMS* | *55* |
| *195* | *Bamberg, FRG/TSA* | *55* |
| 196 | San Diego NTC, CA/Navy | 55 |
| 197 | Loring AFB, ME/AFCOMS | 54 |
| 198 | McConnell AFB, KS/AFCOMS | 54 |
| *199* | *Bad Kissingen, FRG/TSA* | *54* |
| *200* | *Heidelberg, FRG/TSA* | *54* |
| 201 | Mare Island, CA/Navy | 54 |
| 202 | Twentynine Palms, CA/USMC | 53 |
| 203 | Columbus AFB, MS/AFCOMS | 53 |
| 204 | Moody AFB, GA/AFCOMS | 53 |
| 205 | Kelly AFB, TX/AFCOMS | 53 |
| 206 | Annapolis, MD/Navy | 53 |
| *207* | *La Maddalena, Italy/Navy* | *53* |
| 208 | Parris Island, SC/USMC | 52 |
| 209 | Hanscom AFB, MA/AFCOMS | 52 |
| *210* | *Neu Ulm, FRG/TSA* | *52* |
| *211* | *Guantanamo Bay, Cuba/Navy* | *52* |

*Continued on page 118*



## San Diego Group/Navy

| Store | Store Class | Total Store $ Sales | % of Store Total: Grocery | % of Store Total: Meat | % of Store Total: Produce | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| China Lake, CA | 2 | 2,687,139 | 77 | 17 | 6 | +2.5 | 3,972 | 57 | .07 |
| El Centro, CA | 1 | 938,258 | 75 | 19 | 6 | +0.3 | 2,720 | 29 | .03 |
| Long Beach, CA | 7 | 23,338,737 | 72 | 21 | 7 | +4.9 | 26,800 | 73 | .64 |
| Miramar, CA | 8 | 44,618,312 | 75 | 18 | 7 | +12.1 | 38,600 | 96 | 1.22 |
| North Island, CA | 6 | 14,761,115 | 75 | 19 | 6 | +1.1 | 14,415 | 85 | .40 |
| Port Hueneme, CA | 6 | 13,874,290 | 74 | 20 | 6 | +1.4 | 16,700 | 69 | .38 |
| Point Mugu, CA | 2 | 3,513,655 | 78 | 16 | 6 | −1.1 | 7,520 | 39 | .10 |
| San Diego NS, CA | 8 | 36,553,792 | 76 | 19 | 5 | +2.8 | 32,590 | 93 | 1.00 |
| San Diego NTC, CA | 4 | 8,800,101 | 78 | 16 | 6 | −5.1 | 13,238 | 55 | .24 |
| **Group Totals** | | **$149,085,399** | **75%** | **19%** | **6%** | **+4.8%** | **156,510** | **$79** | **4.08%** |
| **CONUS Navy Totals** | | **$649,180,429** | **76%** | **18%** | **6%** | **+2.9%** | **836,863** | **$65** | **17.77%** |

/a Less than 0.1%.
N.A. Totals not meaningful for comparison purposes.

Store classes for Navy commissaries are based upon total average monthly sales, as follows:

| | | | |
|---|---|---|---|
| Class 1 Up to $100,000 | Class 3 $300,001-$500,000 | Class 5 $750,001-$1,000,000 | Class 7 $1,500,001-$2,000,000 |
| Class 2 $100,001-$300,000 | Class 4 $500,001-$750,000 | Class 6 $1,000,001-$1,500,000 | Class 8 Over $2,000,000 |

**Notes:** All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY85 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data.

## Naples Region/Navy

| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| La Maddalena | 1 | 953,930 | 90 | 10 | 0 | +0.4 | 1,500 | 53 | .10 |
| Naples | 4 | 7,072,357 | 83 | 13 | 4 | −1.7 | 6,804 | 87 | .75 |
| Sigonella | 2 | 3,240,502 | 82 | 14 | 4 | +0.8 | 4,125 | 65 | .34 |
| **Region Totals** | | **$11,266,789** | **84%** | **13%** | **3%** | **−0.8%** | **12,429** | **$76** | **1.19%** |

## Pearl Harbor Region/Navy

| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| Barbers Point, HIL | 4 | 8,472,356 | 74 | 18 | 8 | +4.1 | 9,660 | 73 | .90 |
| Lualualei, HI | 1 | 906,498 | 80 | 15 | 5 | +1.0 | 4,009 | 19 | .10 |
| Pearl Harbor, HI | 8 | 53,167,921 | 76 | 17 | 7 | +9.4 | 24,641 | 180 | 5.63 |
| **Regional Totals** | | **$62,546,775** | **76%** | **17%** | **7%** | **+8.5%** | **38,310** | **$136** | **6.63%** |

/a Less than 0.1%.
N.A. Totals not meaningful for comparison purposes.

Store classes for Navy commissaries are based upon total average monthly sales, as follows:

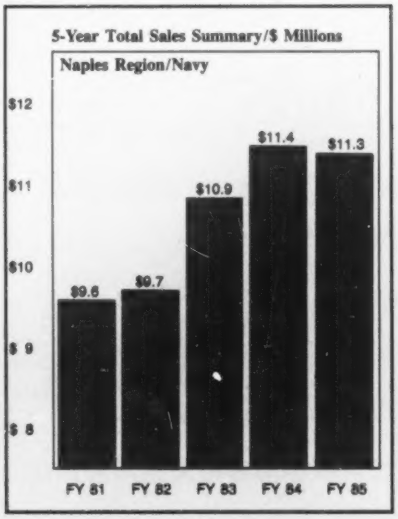
| | | | |
|---|---|---|---|
| Class 1 Up to $100,000 | Class 3 $300,001-$500,000 | Class 5 $750,001-$1,000,000 | Class 7 $1,500,001-$2,000,000 |
| Class 2 $100,001-$300,000 | Class 4 $500,001-$750,000 | Class 6 $1,000,001-$1,500,000 | Class 8 Over $2,000,000 |

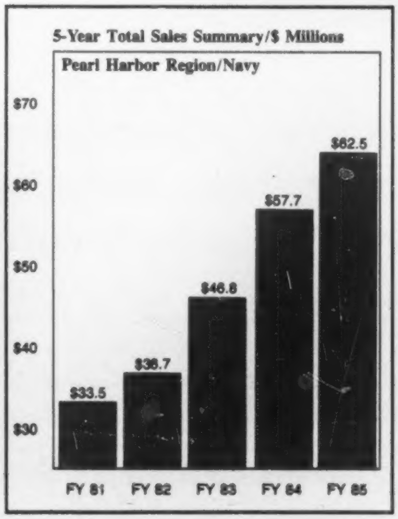
**Notes:** All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY85 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data.

## It's A Fact!

Many commissaries reported total store sales declines in FY85. Can you name the ten overseas commissaries that reported the greatest total store sales declines? They are:

1. RAF Sculthorpe, UK (*−62.6*)
2. Ft. Gulick, Panama (*−38.3*)
3. Crailsheim, FRG (*−25.1*)
4. Jidda, Saudi Arabia (*−23.7*)
5. Dharhan, Saudi Arabia (*−21.6*)
6. Riyadh, Saudi Arabia (*−18.7*)
7. Idar Oberstein, FRG (*−14.6*)
8. Sagamihara, Japan (*−13.8*)
9. Garmisch, FRG (*−13.4*)
10. Wertheim, FRG (*−13.2*)





# Navy Commissary Sales—FY85

## Subic Bay Region/Navy

| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| San Miguel, PI | 2 | 1,266,983 | 77 | 17 | 6 | + 8.9 | 2,514 | 42 | .13 |
| Subic Bay, PI | 5 | 11,162,566 | 80 | 13 | 7 | +18.2 | 7,032 | 132 | 1.18 |
| **Region Totals** | | **$12,429,549** | **80%** | **13%** | **7%** | **+17.1%** | **9,546** | **$109** | **1.32%** |

## United Kingdom Region/Navy

| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| Edzell, Scotland | 1 | 1,078,635 | 80 | 13 | 7 | −0.4 | 3,474 | 26 | .11 |
| Holy Loch, Scotland | 3 | 4,149,094 | 86 | 10 | 4 | −1.9 | 4,841 | 71 | .44 |
| **Regional Totals** | | **$5,227,729** | **85%** | **11%** | **4%** | **−1.6%** | **8,315** | **$52** | **.55%** |

## Yokosuka Region/Navy

| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| Atsugi, Japan | 2 | 2,548,101 | 83 | 12 | 5 | +16.9 | 6,326 | 34 | .27 |
| Sasebo, Japan | 1 | 842,093 | 80 | 16 | 4 | +15.3 | 3,208 | 22 | .09 |
| Yokosuka, Japan | 4 | 8,914,155 | 76 | 18 | 6 | +3.8 | 14,600 | 51 | .94 |
| **Regional Totals** | | **$12,304,340** | **77%** | **17%** | **6%** | **+7.0%** | **24,134** | **$43** | **1.30%** |

/a Less than 0.1%.
N.A. Totals not meaningful for comparison purposes.

Store classes for Navy commissaries are based upon total average monthly sales, as follows:
Class 1 Up to $100,000
Class 2 $100,001-$300,000
Class 3 $300,001-$500,000
Class 4 $500,001-$750,000
Class 5 $750,001-$1,000,000
Class 6 $1,000,001-$1,500,000
Class 7 $1,500,001-$2,000,000
Class 8 Over $2,000,000

**Notes:** All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY85 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data.

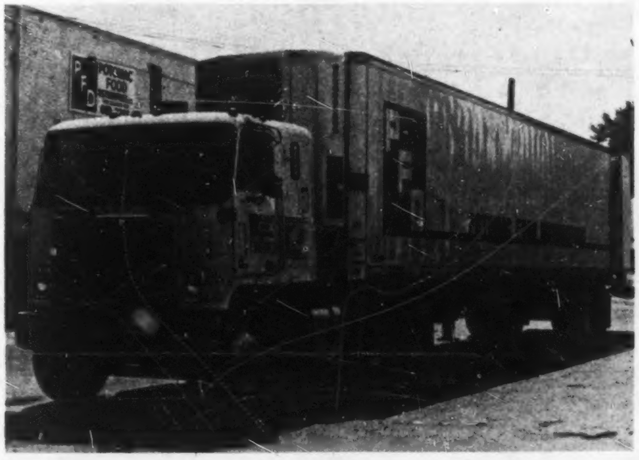
## Navy Commissary Coupon Redemptions—FY85

| | Number | % Share Worldwide | $ Value | % Share Worldwide |
|---|---|---|---|---|
| CONUS | 29,918,141 | 98.4 | 8,671,818 | 98.7 |
| Overseas | 480,114 | 1.6 | 114,399 | 1.3 |
| **Worldwide Totals** | **30,398,255** | **100.0%** | **$8,786,217** | **100.0%** |

*Continued from page 74*

| Rank | Store/Parent Organization | ACV |
|---|---|---|
| 142 | Charleston NWS, SC/Navy | .27 |
| 143 | Novato (Hamilton), CA/Navy | .27 |
| *96* | *Atsugi, Japan/Navy* | *.27* |
| 144 | Grand Forks AFB, ND/AFCOMS | .26 |
| *97* | *RAF Fairford, UK/AFCOMS* | *.26* |
| 145 | Minot AFB, ND/AFCOMS | .25 |
| 146 | Altus AFB, OK/AFCOMS | .25 |
| *98* | *Bad Nauheim, FRG/TSA* | *.25* |
| *99* | *Livorno, Italy/TSA* | *.25* |
| *100* | *Worms, FRG/TSA* | *.25* |
| 147 | Bremerton, WA/Navy | .25 |
| 148 | Philadelphia, PA/Navy | .25 |
| 149 | West Point, NY/TSA | .24 |
| 150 | Grissom AFB, IN/AFCOMS | .24 |
| 151 | K.I. Sawyer AFB, MI/AFCOMS | .24 |
| *101* | *RAF Chicksands, UK/AFCOMS* | *.24* |
| 152 | San Diego NTC, CA/Navy | .24 |
| 153 | Cannon AFB, NM/AFCOMS | .23 |
| *102* | *Zaragoza, Spain/AFCOMS* | *.23* |
| 154 | Annapolis, MD/Navy | .23 |
| 155 | Parris Island, SC/USMC | .22 |
| 156 | Wurtsmith AFB, MI/AFCOMS | .22 |
| 157 | Loring AFB, ME/AFCOMS | .22 |
| *103* | *Izmir, Turkey/AFCOMS* | *.22* |
| *104* | *Ft. Greely, AK/TSA* | *.22* |
| *105* | *Ludwigsburg, FRG/TSA* | *.22* |
| 158 | Lemoore, CA/Navy | .22 |
| 159 | Oakland AB, CA/TSA | .21 |
| 160 | Oakdale ASC, PA/TSA | .21 |
| 161 | Vint Hill Farms, VA/TSA | .21 |
| 162 | Ft. Monroe, VA/TSA | .21 |
| 163 | Ft. Sheridan, IL/TSA | .21 |
| 164 | Blytheville AFB, AR/AFCOMS | .21 |
| 165 | Goodfellow AFB, TX/AFCOMS | .21 |
| 166 | Reese AFB, TX/AFCOMS | .21 |
| *106* | *Illesheim, FRG/TSA* | *.21* |
| *107* | *Schwaebisch Gmeund, FRG/TSA* | *.21* |
| 167 | Brunswick, ME/Navy | .21 |
| 168 | Corpus Christi, TX/Navy | .21 |
| *108* | *Ankara, Turkey/AFCOMS* | *.20* |
| *109* | *Erlangen, FRG/TSA* | *.20* |
| *110* | *Goeppingen, FRG/TSA* | *.20* |
| 169 | Mitchel Field, NY/Navy | .20 |
| 170 | Cecil Field, FL/Navy | .19 |
| 171 | Ft. Ritchie, MD/TSA | .19 |
| 172 | Twentynine Palms, CA/USMC | .19 |
| 173 | Ft. McNair, DC/TSA | .19 |
| 174 | Brooks AFB, TX/AFCOMS | .19 |
| 175 | Patuxent, MD/Navy | .19 |
| *111* | *Iraklion AS, Greece/AFCOMS* | *.18* |
| 176 | Yuma, AZ/USMC | .17 |
| *112* | *Cairo, Egypt/TSA* | *.17* |
| *113* | *Dharhan, Saudi Arabia/TSA* | *.17* |
| 177 | New Cumberland, PA/TSA | .17 |
| 178 | Edgewood Arsenal, MD/TSA | .16 |
| *114* | *RAF Menwith Hill, UK/AFCOMS* | *.16* |
| *115* | *Bad Kissingen, FRG/TSA* | *.16* |
| 179 | Ft. McPherson, GA/TSA | .15 |
| 180 | Stewart ASE, NY/TSA | .15 |
| 181 | Tobyhanna AD, PA/TSA | .15 |
| 182 | Albany, GA/USMC | .15 |
| 183 | Richmond DGSC, VA/TSA | .14 |
| 184 | Laughlin AFB, TX/AFCOMS | .14 |
| *116* | *Hellenikon Br., Greece/AFCOMS* | *.14* |
| 185 | Gulfport, MS/Navy | .14 |
| 186 | Ft. Drum, NY/TSA | .13 |
| 187 | Vance AFB, OK/AFCOMS | .13 |
| *117* | *Amberg, FRG/TSA* | *.13* |
| *118* | *San Miguel, PI/Navy* | *.13* |
| *119* | *Bad Hersfeld, FRG/TSA* | *.12* |
| *120* | *Bertchesgaden, FRG/TSA* | *.12* |
| *121* | *Wertheim, FRG/TSA* | *.12* |
| 188 | Key West, FL/Navy | .12 |
| 189 | Meridian, MS/Navy | .12 |
| 190 | Ft. Irwin, CA/TSA | .11 |
| 191 | Rock Island, IL/TSA | .11 |
| *122* | *Hessisch-Oldendorf, FRG/AFCOMS* | *.11* |
| *123* | *Bad Toelz, FRG/TSA* | *.11* |
| *124* | *Hohentels, FRG/TSA* | *.11* |
| 192 | Whiting Field, FL/Navy | .11 |
| *125* | *Edzell, Scotland/Navy* | *.11* |
| 193 | White Sands Missile Range, NM/TSA | .10 |
| 194 | San Onofre, CA/USMC | .10 |
| 195 | Arnold AFB, TN/AFCOMS | .10 |
| *126* | *Bindlach, FRG/TSA* | *.10* |
| *127* | *Garmisch, FRG/TSA* | *.10* |
| *128* | *Schwaebisch Hall, FRG/TSA* | *.10* |
| 196 | Stockton, CA/Navy | .10 |
| 197 | Treasure Island, CA/Navy | .10 |
| 198 | Point Mugu, CA/Navy | .10 |
| *129* | *La Maddalena, Italy/Navy* | *.10* |
| *130* | *Lualualei, HI/Navy* | *.10* |
| *131* | *RAF Wethersfield, UK/AFCOMS* | *.09* |
| *132* | *Crailsheim, FRG/TSA* | *.09* |
| *133* | *Sasebo, Japan/Navy* | *.09* |
| 199 | New River, NC/USMC | .08 |

*Continued on page 118*



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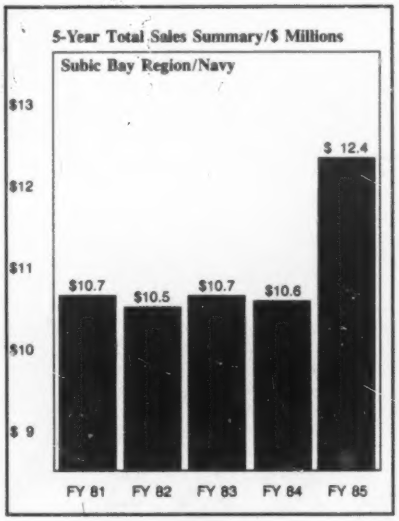
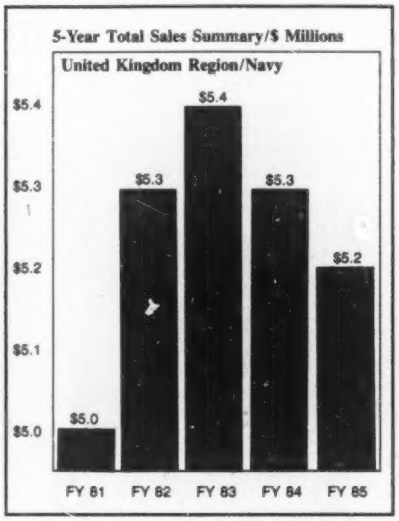
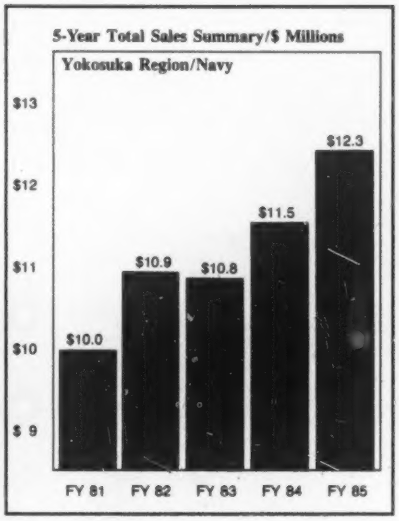
# Navy Commissary Sales—FY85







## Stand-Alone Stores/Navy

| Store | Store Class | Total Store $ Sales | % of Store Total | | | Total Sales % Change vs. FY84 | Total Sq. Ft. Sales Area | Avg. Mo. $ Sales/ Sq. Ft. | ACV |
|---|---|---|---|---|---|---|---|---|---|
| | | | Grocery | Meat | Produce | | | | |
| Adak, AK | 3 | 3,729,281 | 78 | 15 | 7 | +9.7 | 8,480 | 37 | .40 |
| Argentia, Newfoundland | 1 | 669,136 | 80 | 14 | 6 | −2.4 | 6,726 | 8 | .07 |
| Bermuda | 3 | 3,927,501 | 80 | 14 | 6 | +8.4 | 5,607 | 58 | .42 |
| Chinhae, Korea | 1 | 392,686 | 77 | 20 | 3 | −9.4 | 2,400 | 14 | .04 |
| Exmouth, Australia | 1 | 541,752 | 75 | 18 | 7 | −9.9 | 3,077 | 15 | .06 |
| Guam | 7 | 18,626,933 | 77 | 17 | 6 | +12.6 | 15,303 | 101 | 1.97 |
| Guantanamo Bay | 3 | 5,032,032 | 73 | 17 | 10 | +8.9 | 8,100 | 52 | .53 |
| Keflavik, Iceland | 3 | 3,741,677 | 77 | 16 | 7 | +3.7 | 7,784 | 40 | .40 |
| Roosevelt Roads, PR | 4 | 7,627,209 | 77 | 17 | 6 | +1.1 | 9,440 | 67 | .81 |
| Rota, Spain | 3 | 5,481,130 | 85 | 11 | 4 | −0.6 | 8,716 | 52 | .58 |
| **Stand-Alone Stores' Totals** | | **$49,769,337** | **N.A.** | **N.A.** | **N.A.** | **N.A.** | **75,633** | **$55** | **5.27%** |
| **Overseas Navy Totals** | | **$153,544,528** | **78%** | **16%** | **6%** | **+7.4%** | **168,367** | **$76** | **16.26%** |
| **Worldwide Navy Totals** | | **$802,724,957** | **76%** | **18%** | **6%** | **+3.7%** | **1,005,230** | **$67** | **17.46%** |

/a Less than 0.1%.
N.A. Totals not meaningful for comparison purposes.

Store classes for Navy commissaries are based upon total average monthly sales, as follows:

| | | | |
|---|---|---|---|
| Class 1 Up to $100,000 | Class 3 $300,001-$500,000 | Class 5 $750,001-$1,000,000 | Class 7 $1,500,001-$2,000,000 |
| Class 2 $100,001-$300,000 | Class 4 $500,001-[illegible],000 | Class 6 $1,000,001-$1,500,000 | Class 8 Over $2,000,000 |

**Notes:** All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY85 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data.

*Continued from page 116*

| Rank | Store/Parent Organization | ACV |
|---|---|---|
| 200 | Barstow, CA/USMC | .08 |
| *134* | *Oslo, Norway/AFCOMS* | *.08* |
| *135* | *Bad Aibling, FRG/TSA* | *.08* |
| 201 | Scotia, NY/Navy | .08 |
| 202 | Yorktown, VA/Navy | .08 |
| 203 | Lakehurst, NJ/Navy | .08 |
| 204 | Seneca AD, NY/TSA | .07 |
| 205 | ARDC (Picatinny), PA/TSA | .07 |
| *136* | *Jidda, Saudi Arabia/TSA* | *.07* |
| 206 | China Lake, CA/Navy | .07 |
| *137* | *Argentia, Nfdlnd./Navy* | *.07* |
| 207 | Lexington, KY/TSA | .07 |
| 208 | Sierra AD, CA/TSA | .06 |
| *138* | *Royal Oaks HA, Spain/AFCOMS* | *.06* |
| *139* | *Idar Oberstein, FRG/TSA* | *.06* |
| 209 | Beeville, TX/Navy | .06 |
| 210 | Athens, GA/Navy | .06 |
| *140* | *Exmouth, AUS/Navy* | *.06* |
| 211 | Kingsville, TX/Navy | .06 |
| 212 | Dugway Prov. Grnds., UT/TSA | .05 |
| 213 | Yuma Prov. Grnds., AS/TSA | .05 |
| 214 | Fallon, NV/Navy | .05 |
| *141* | *Preum AS, FRG/AFCOMS* | *.04* |
| *142* | *Chinhae, Korea/Navy* | *.04* |
| 215 | Avon Park Range, FL/AFCOMS | .03 |
| 216 | Dahlgren, VA/Navy | .03 |
| 217 | El Centro, CA/Navy | .03 |
| 218 | Ft. Fisher AFS, NC/AFCOMS | .02 |
| *143* | *RAF Sculthorpe, UK/AFCOMS* | *.02* |
| 219 | Cutler, ME/Navy | .02 |
| 220 | Winter Harbor, ME/Navy | .02 |
| 221 | Kings Bay, GA/Navy | .02 |
| 222 | Camp Merrill, VA/TSA | .01 |
| 223 | Calumet AFS, MI/AFCOMS | .01 |
| 224 | Port Austin AFS, MI/AFCOMS | .01 |
| 225 | North Truro AFS, MA/AFCOMS | .01 |
| 226 | Makah AFS, WA/AFCOMS | .01 |
| 227 | Gila Bend Aux. Fld., AZ/AFCOMS | .01 |
| 228 | Indian Sprg. Fld., AZ/AFCOMS | .01 |
| *144* | *Trier HA, FRG/AFCOMS* | *.01* |
| 229 | Crane, IN/Navy | .01 |
| 230 | Holbrook AFB, AZ/AFCOMS | /a |
| *145* | *RAF Burtonwood, UK/AFCOMS* | /a |

## It's A Fact!

Can you name the 5 military commissaries with the smallest total square feet of sales area? They are:

1. Camp Merrill, GA/TSA (*1,416*)
2. Royal Oaks HA, Spain/AFCOMS (*1,315*)
3. RAF Burtonwood, UK/AFCOMS (*1,127*)
4. Holbrook AFB, AZ/AFCOMS (*592*)
5. Kinser, JA/AFCOMS (*0*)

*Continued from page 110*

| Rank | Store/Parent Organization | Avg. Mo. Sales/SF |
|---|---|---|
| *212* | *Rota, Spain/Navy* | *52* |
| 213 | Grand Forks AFB, ND/AFCOMS | 51 |
| 214 | Hunter AAF, GA/TSA | 51 |
| 215 | Tobyhanna AD, PA/TSA | 51 |
| *216* | *Rhein Main AB, FRG/AFCOMS* | *51* |
| 217 | Ft. Richardson, AK/TSA | 51 |
| 218 | Mitchel Field, NY/Navy | 51 |
| *219* | *Yokosuka, Japan/Navy* | *51* |
| 220 | Hadnot Point, NC/USMC | 50 |
| 221 | Edwards AFB, CA/AFCOMS | 50 |
| *222* | *RAF Bentwaters, UK/AFCOMS* | *50* |
| *223* | *Ft. Gulick, Panama/TSA* | *50* |
| *224* | *Pirmasens, FRG/TSA* | *50* |
| 225 | Portsmouth, VA/Navy | 50 |
| *226* | *Incirlik, Turkey/AFCOMS* | *49* |
| 227 | Tarawa Terrace, NC/USMC | 48 |
| 228 | Ft. Stewart, GA/TSA | 47 |
| 229 | Rock Island, IL/TSA | 47 |
| *230* | *Bitburg AB, FRG/AFCOMS* | *47* |
| *231* | *Berlin (Free Zone), FRG/TSA* | *47* |
| *232* | *Schweinfurt, FRG/TSA* | *47* |
| *233* | *Iwakuni, Japan/USMC* | *47* |
| 234 | Whiteman AFB, MO/AFCOMS | 46 |
| 235 | Holloman AFB, NM/AFCOMS | 46 |
| *236* | *RAF Alconbury, UK/AFCOMS* | *46* |
| *237* | *Fulda, FRG/TSA* | *46* |
| *238* | *Lakehurst, NJ/Navy* | 46 |
| 239 | Corpus Christi, TX/Navy | 45 |
| 240 | Chanute AFB, IL/AFCOMS | 45 |
| *241* | *Baumholder, FRG/TSA* | *45* |
| *242* | *Grafenwoehr, FRG/TSA* | *45* |
| 243 | Ft. McNair, DC/TSA | 44 |
| 244 | White Sands Missile Range, NM/TSA | 44 |
| 245 | Plattsburgh AFB, NY/AFCOMS | 44 |
| *246* | *Sembach AB, FRG/AFCOMS* | *44* |
| 247 | Bangor, WA/Navy | 44 |
| 248 | Athens, GA/Navy | 44 |
| *249* | *Kitzingen, FRG/TSA* | *43* |
| 250 | Philadelphia, PA/Navy | 43 |
| 251 | Gulfport, MS/Navy | 43 |
| 252 | Edgewood Arsenal, MD/TSA | 42 |
| 253 | K.I. Sawyer AFB, MI/AFCOMS | 42 |
| 254 | Vance AFB, OK/AFCOMS | 42 |
| *255* | *Hellenikon Br., Greece/AFCOMS* | *42* |
| *256* | *RAF Menwith Hill, UK/AFCOMS* | *42* |
| *257* | *Chievres, Belgium/TSA* | *42* |
| *258* | *Zweibruecken, FRG/TSA* | *42* |
| 259 | Novato (Hamilton), CA/Navy | 42 |
| *260* | *San Miguel, PI/Navy* | *42* |
| 261 | New River, NC/USMC | 41 |
| *262* | *Aviano AB, Italy/AFCOMS* | *41* |
| *263* | *Bertchesgaden, FRG/TSA* | *41* |
| *264* | *Giessen, FRG/TSA* | *41* |
| *265* | *Wildflecken, FRG/TSA* | *41* |
| 266 | Key West, FL/Navy | 41 |
| 267 | Fallon, NV/Navy | 41 |
| 268 | Whiting Field, FL/Navy | 41 |
| 269 | Yuma, AZ/USMC | 40 |
| *270* | *RAF Chicksands, UK/AFCOMS* | *40* |
| *271* | *Bremerhaven, FRG/TSA* | *40* |
| *272* | *Ludwigsburg, FRG/TSA* | *40* |
| 273 | Lemoore, CA/Navy | 40 |
| 274 | Meridian, MS/Navy | 40 |
| *275* | *Keflavik, Iceland/Navy* | *40* |
| *276* | *Torrejon AB, Spain/AFCOMS* | *40* |
| 277 | Arnold AFB, TN/AFCOMS | 39 |
| 278 | Wurtsmith AFB, MI/AFCOMS | 39 |
| 279 | Reese AFB, TX/AFCOMS | 39 |
| 280 | Stockton, CA/Navy | 39 |
| 281 | Point Mugu, CA/Navy | 39 |
| 282 | Barstow, CA/USMC | 38 |
| 283 | Cannon AFB, NM/AFCOMS | 38 |
| *284* | *Amberg, FRG/TSA* | *38* |
| *285* | *Ansbach, FRG/TSA* | *38* |
| *286* | *Heilbronn, FRG/TSA* | *38* |
| *287* | *Munich, FRG/TSA* | *38* |
| *288* | *Schwaebisch Gmeund, FRG/TSA* | *38* |
| 289 | Sierra AD, CA/TSA | 37 |
| 290 | Grissom AFB, IN/AFCOMS | 37 |
| *291* | *RAF Fairford, UK/AFCOMS* | *37* |
| *292* | *Bindlach, FRG/TSA* | *37* |
| *293* | *Adak, AK/Navy* | *37* |
| 294 | San Onofre, CA/USMC | 36 |
| *295* | *Makiminato, Okinawa/AFCOMS* | *36* |
| *296* | *Royal Oaks HA, Spain/AFCOMS* | *36* |
| 297 | ARDC (Picatinny), PA/TSA | 35 |
| 298 | Richmond DGSC, VA/TSA | 35 |
| 299 | Los Angeles AFB, CA/AFCOMS | 35 |
| 300 | Laughlin AFB, TX/AFCOMS | 35 |
| *301* | *Aschaffenburg, FRG/TSA* | *35* |
| *302* | *Illesheim, FRG/TSA* | *35* |
| *303* | *Livorno, Italy/TSA* | *35* |
| 304 | Yorktown, VA/Navy | 35 |
| *305* | *Iraklion AS, Greece/AFCOMS* | *34* |
| *306* | *Zaragoza, Spain/AFCOMS* | *34* |
| *307* | *Izmir, Turkey/AFCOMS* | *34* |
| *308* | *San Vito AS, Italy/AFCOMS* | *34* |
| *309* | *Atsugi, Japan/Navy* | *34* |
| *310* | *Hellenikon AB, Greece/AFCOMS* | *33* |
| 311 | Winter Harbor, ME/Navy | 33 |
| 312 | Charleston NS, SC/Navy | 33 |
| 313 | Treasure Island, CA/Navy | 33 |
| *314* | *RAF Greenham Common, UK/AFCOMS* | *32* |
| *315* | *Misawa AB, Japan/AFCOMS* | *32* |
| *316* | *Bad Kreuznach, FRG/TSA* | *32* |
| *317* | *Bad Nauheim, FRG/TSA* | *32* |
| *318* | *Gelnhausen, FRG/TSA* | *32* |
| 319 | New Cumberland, PA/TSA | 32 |
| *320* | *Darmstadt, FRG/TSA* | *31* |
| *321* | *Schinnen, NL/TSA* | *31* |
| 322 | Beeville, TX/Navy | 31 |
| *323* | *Cairo, Egypt/TSA* | *30* |
| *324* | *Karlsruhe, FRG/TSA* | *30* |
| 325 | Scotia, NY/Navy | 30 |
| 326 | Albany, GA/USMC | 29 |
| *327* | *Crailsheim, FRG/TSA* | *29* |
| 328 | El Centro, CA/Navy | 29 |
| *329* | *Ft. Greely, AK/TSA* | *28* |
| *330* | *Sagamihara, Japan/TSA* | *28* |
| *331* | *Bad Hersfeld, FRG/TSA* | *28* |
| *332* | *Kelley Barracks, FRG/TSA* | *28* |
| *333* | *Worms, FRG/TSA* | *28* |
| 334 | Avon Park Range, FL/AFCOMS | 27 |
| *335* | *Hessisch-Oldendorf, FRG/AFCOMS* | *27* |
| *336* | *Dharhan, Saudi Arabia/TSA* | *27* |
| *337* | *Wertheim, FRG/TSA* | *27* |
| *338* | *Hohenfels, FRG/TSA* | *26* |
| *339* | *Edzell, Scotland/Navy* | *26* |
| 340 | Holbrook AFB, AZ/AFCOMS | 25 |
| *341* | *Oslo, Norway/AFCOMS* | *25* |
| *342* | *Camp New Amsterdam, NL/AFCOMS* | *25* |
| 343 | Kingsville, TX/Navy | 25 |
| *344* | *Garmisch, FRG/TSA* | *24* |

*Continued on page 125*

# All-Service Commissary Sales by Geographic Locations

## Country

| | DoD Total | % of DoD | Air Force | Army | Navy | USMC |
|---|---|---|---|---|---|---|
| Australia | 541,752 | .08 | – | – | 541,752 | – |
| Azores | 4,357,463 | .63 | 4,357,463 | – | – | – |
| Belgium | 5,371,224 | .78 | – | 5,371,224 | – | – |
| Bermuda | 3,927,501 | .57 | – | – | 3,927,501 | – |
| Canada | 669,136 | .10 | – | – | 669,136 | – |
| Cuba | 5,032,032 | .73 | – | – | 5,032,032 | – |
| Egypt | 1,587,268 | .23 | – | 1,587,268 | – | – |
| Germany | 324,653,777 | 47.16 | 70,120,615 | 254,533,162 | – | – |
| Greece | 6,363,125 | .92 | 6,363,125 | – | – | – |
| Iceland | 3,741,677 | .54 | – | – | 3,741,677 | – |
| Italy | 24,553,034 | 3.57 | 5,912,815 | 7,373,430 | 11,266,789 | – |
| Japan | 85,237,765 | 12.38 | 64,522,441 | 5,586,591 | 12,304,349 | 2,824,384 |
| Korea | 63,863,323 | 9.28 | 18,588,562 | 44,882,075 | 392,686 | |
| Netherlands | 7,287,585 | 1.06 | 3,235,440 | 4,052,145 | – | – |
| Norway | 775,288 | .11 | 775,288 | – | – | – |
| Panama | 29,651,330 | 4.31 | – | 29,651,330 | – | – |
| Philippines | 40,401,577 | 5.87 | 27,972,028 | – | 12,429,549 | – |
| Saudi Arabia | 5,586,145 | .81 | – | 5,586,145 | – | – |
| Spain | 15,844,976 | 2.30 | 10,363,846 | – | 5,481,130 | – |
| Turkey | 8,785,444 | 1.28 | 8,785,444 | – | – | – |
| United Kingdom | 50,202,133 | 7.29 | 44,974,404 | – | 5,227,729 | – |
| **Totals** | **$688,433,555** | **100.0%** | **$265,971,471** | **$358,623,370** | **$61,014,330** | **$2,824,384** |

## State

| | DoD Total | % of DoD | Air Force | Army | Navy | USMC |
|---|---|---|---|---|---|---|
| Alabama | 87,419,738 | 2.24 | 31,740,781 | 55,678,957 | – | – |
| Alaska | 57,770,184 | 1.48 | 34,794,482 | 19,246,421 | 3,729,281 | – |
| Arizona | 100,221,881 | 2.56 | 76,100,296 | 18,045,398 | – | 6,076,187 |
| Arkansas | 37,113,922 | .95 | 37,113,922 | – | – | – |
| California | 582,629,456 | 14.90 | 226,792,230 | 67,803,539 | 229,365,089 | 58,668,598 |
| Colorado | 120,664,305 | 3.09 | 76,020,629 | 44,643,676 | – | – |
| Connecticut | 22,803,530 | .58 | – | – | 22,803,530 | – |
| Delaware | 17,860,246 | .46 | 17,860,246 | – | – | – |
| District of Columbia | 51,967,634 | 1.33 | 20,543,008 | 31,424,626 | – | – |
| Florida | 269,973,656 | 6.90 | 172,869,549 | – | 97,104,016 | – |
| Georgia | 156,769,734 | 4.01 | 28,989,564 | 119,520,209 | 2,940,655 | 5,319,306 |
| Guam | 33,113,113 | .48 | 14,486,180 | – | 18,626,933 | – |
| Hawaii | 134,767,578 | 3.45 | 30,349,271 | 29,618,591 | 62,546,775 | 12,252,941 |
| Idaho | 11,779,256 | .30 | 11,779,256 | – | – | – |
| Illinois | 65,449,971 | 1.67 | 38,775,880 | 26,674,091 | – | – |
| Indiana | 40,665,985 | 1.04 | 8,734,684 | 16,257,714 | 15,673,587 | – |
| Iowa | – | – | – | – | – | – |
| Kansas | 54,123,872 | 1.38 | 15,493,342 | 38,630,530 | – | – |
| Kentucky | 69,548,229 | 1.78 | – | 69,548,229 | – | – |
| Louisiana | 81,445,492 | 2.08 | 49,333,687 | 21,721,365 | 10,390,440 | – |
| Maine | 17,233,969 | .44 | 8,052,957 | – | 9,181,012 | – |
| Maryland | 106,787,211 | 2.73 | 35,368,128 | 54,924,013 | 15,495,070 | – |
| Massachusetts | 35,747,072 | .91 | 19,696,384 | 16,049,688 | – | – |
| Michigan | 28,664,885 | .73 | 17,433,580 | 11,231,305 | – | – |
| Minnesota | – | – | – | – | – | – |
| Mississippi | 49,856,980 | 1.28 | 40,457,945 | – | 9,399,035 | – |
| Missouri | 28,492,727 | .73 | 10,112,769 | 18,379,958 | – | – |
| Montana | 11,579,314 | .30 | 11,579,314 | – | – | – |
| Nebraska | 31,674,158 | .81 | 31,674,158 | – | – | – |
| Nevada | 37,842,822 | .96 | 35,863,256 | – | 1,979,566 | – |
| New Hampshire | 19,248,807 | .49 | 19,248,807 | – | – | – |
| New Jersey | 64,331,767 | 1.65 | 43,460,802 | 18,069,450 | 2,801,515 | – |
| New Mexico | 54,310,825 | 1.39 | 50,709,259 | 3,601,566 | – | – |
| New York | 67,930,567 | 1.74 | 25,906,114 | 31,569,754 | 10,454,699 | – |
| North Carolina | 113,606,957 | 2.91 | 15,942,147 | 50,784,798 | – | 46,880,012 |
| North Dakota | 18,633,284 | .48 | 18,633,284 | – | – | – |
| Ohio | 40,849,006 | 1.05 | 40,849,006 | – | – | – |
| Oklahoma | 80,690,772 | 2.06 | 48,541,568 | 32,149,204 | – | – |
| Oregon | – | – | – | – | – | – |
| Pennsylvania | 40,897,343 | 1.05 | – | 31,910,096 | 8,987,247 | – |
| Puerto Rico | 30,005,984 | .77 | – | 22,378,775 | 7,627,209 | – |

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| | | | | | | |
|---|---|---|---|---|---|---|
| Rhode Island | 12,989,892 | .33 | – | – | 12,989,892 | – |
| South Carolina | 102,537,718 | 2.62 | 52,043,098 | 22,576,681 | 19,895,501 | – |
| South Dakota | 13,158,654 | .34 | 13,158,654 | – | – | – |
| Tennessee | 20,254,509 | .52 | 3,774,135 | – | 16,480,374 | – |
| Texas | 371,203,778 | 9.50 | 223,811,630 | 135,713,863 | 11,678,285 | – |
| Utah | 23,172,467 | .59 | 21,431,374 | 1,741,093 | – | – |
| Vermont | – | – | – | – | – | – |
| Virginia | 324,060,661 | 8.29 | 35,794,310 | 163,685,689 | 101,935,511 | 22,645,151 |
| Washington | 156,694,570 | 4.01 | 65,624,217 | 41,444,948 | 49,625,405 | – |
| West Virginia | – | – | – | – | – | – |
| Wisconsin | – | – | – | – | – | – |
| Wyoming | 10,494,201 | .27 | 10,494,201 | – | – | – |
| **Totals** | **$3,909,038,591** | **100.0%** | **$1,792,[illegible]29,104** | **$1,215,024,227** | **$741,710,627** | **$159,864,633** |

**Note:** Details may not add to totals due to rounding.

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## All-Service Commissary Store Rankings by Total Sq. Ft. of Sales Area

* Indicates Army TSA store with grocery annex(es). Annex(es) totals are added to store total. Overseas stores are shown in italics and are ranked separately from CONUS stores. Parent agency or branch of service for each commissary is shown to right of store name and location.

**AFCOMS**–Air Force Commissary Service

**NAVY**–Navy Resale System

**TSA**–U.S. Army Troop Support Agency

**USMC**–U.S. Marine Corps

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| Rank | Store/Parent Organization | Total Sq. Ft. |
|---|---|---|
| 1 | Carswell AFB, TX/AFCOMS | 50,000 |
| 2 | Lackland AFB, TX/AFCOMS | 43,870 |
| 3 | Ft. Bragg, NC/TSA | 42,134* |
| 4 | Wright-Patterson AFB, OH/AFCOMS | 39,750 |
| 5 | McGuire AFB, NJ/AFCOMS | 39,444 |
| 6 | Miramar, CA/Navy | 38,600 |
| 7 | Ft. Hood, TX/TSA | 36,551* |
| 8 | Little Creek, VA/Navy | 35,912 |
| 9 | Lowry AFB, CO/AFCOMS | 35,413 |
| 10 | McClellan AFB, CA/AFCOMS | 35,000 |
| 11 | Randolph AFB, TX/AFCOMS | 33,628 |
| 12 | McChord AFB, WA/AFCOMS | 32,979 |
| 13 | Ft. Sill, OK/TSA | 32,951 |
| 14 | Ft. Benning, GA/TSA | 32,729 |
| 15 | San Diego NS, CA/Navy | 32,590 |
| 16 | Ft. Bliss, TX/TSA | 32,538* |
| 17 | Offutt AFB, NE/AFCOMS | 32,205 |
| 18 | Cameron Station, VA/TSA | 31,616 |
| *1* | *Schofield Barracks, HI/TSA* | *31,452** |
| *2* | *Elmendorf AFB, AK/AFCOMS* | *31,129* |
| 19 | Hanscom AFB, MA/AFCOMS | 31,125 |
| 20 | Ft. Knox, KY/TSA | 31,025 |
| 21 | Keesler AFB, MS/AFCOMS | 30,689 |
| 22 | Orlando, FL/Navy | 30,155 |
| 23 | March AFB, CA/AFCOMS | 29,480 |
| 24 | Maxwell AFB, AL/AFCOMS | 29,400 |
| *3* | *Yongsan, Korea/TSA* | *29,387* |
| 25 | Tyndall AFB, FL/AFCOMS | 29,385 |
| *4* | *Kadena AB, Okinawa, JA/AFCOMS* | *29,225* |
| 26 | Barksdale AFB, LA/AFCOMS | 29,143 |
| 27 | Mather AFB, CA/AFCOMS | 29,000 |
| 28 | Tinker AFB, OK/AFCOMS | 29,000 |
| 29 | Andrews AFB, MD/AFCOMS | 28,827 |
| 30 | Little Rock AFB, AR/AFCOMS | 28,616 |
| 31 | Patrick AFB, FL/AFCOMS | 28,137 |
| 32 | Ft. Stewart, GA/TSA | 27,953 |
| 33 | Nellis AFB, NV/AFCOMS | 27,593 |
| 34 | Los Angeles AFB, CA/AFCOMS | 27,510 |
| 35 | Ft. Meade, MD/TSA | 27,178* |
| 36 | Ft. Sam Houston, TX/TSA | 26,904 |
| 37 | Long Beach, CA/Navy | 26,800 |
| 38 | Kirtland AFB, NM/AFCOMS | 26,638 |
| 39 | Langley AFB, VA/AFCOMS | 26,532 |
| 40 | Robins AFB, GA/AFCOMS | 26,522 |
| 41 | Ft. Belvoir, VA/TSA | 26,385 |
| 42 | Travis AFB, CA/AFCOMS | 26,350 |
| 43 | El Toro, CA/USMC | 26,250 |
| 44 | Camp Pendleton, CA/USMC | 26,240 |
| 45 | Charleston AFB, SC/AFCOMS | 26,000 |
| 46 | Walter Reed AMC, DC/TSA | 25,858 |
| 47 | Ft. Campbell, KY/TSA | 25,770 |
| 48 | Charleston NS, SC/Navy | 25,727 |
| 49 | Norfolk, VA/Navy | 25,711 |
| 50 | Pease AFB, NH/AFCOMS | 25,506 |
| 51 | Davis-Monthan AFB, AZ/AFCOMS | 25,400 |
| 52 | McDill AFB, FL/AFCOMS | 25,280 |
| 53 | Ft. Lee, VA/TSA | 25,240 |
| 54 | Bergstrom AFB, TX/AFCOMS | 25,196 |
| 55 | Luke AFB, AZ/AFCOMS | 25,100 |
| 56 | Sheppard AFB, TX/AFCOMS | 25,000 |
| 57 | Tarawa Terrace, NC/USMC | 24,756 |
| 58 | Chanute AFB, IL/AFCOMS | 24,690 |
| *5* | *Pearl Harbor, HI/Navy* | *24,641* |
| *6* | *Ramstein AB, FRG/AFCOMS* | *24,616* |
| 59 | Dover AFB, DE/AFCOMS | 24,544 |
| 60 | Hill AFB, UT/AFCOMS | 24,352 |
| 61 | Eglin AFB, FL/AFCOMS | 24,192 |
| 62 | Ft. Monmouth, NJ/TSA | 24,064 |
| 63 | McConnell AFB, KS/AFCOMS | 24,054 |
| 64 | Scott AFB, IL/AFCOMS | 24,000 |
| 65 | Vandenberg AFB, CA/AFCOMS | 23,962 |
| 66 | Oceana, VA/Navy | 23,839 |
| 67 | Bolling AFB, DC/AFCOMS | 23,808 |
| 68 | Norton AFB, CA/AFCOMS | 23,758 |
| 69 | Ft. Eustis, VA/TSA | 23,669* |
| 70 | Ft. Riley, KS/TSA | 23,500 |
| 71 | Holloman AFB, NM/AFCOMS | 23,427 |
| 72 | Presidio of S.F., CA/TSA | 23,264 |
| 73 | Peterson AFB, CO/AFCOMS | 23,144 |
| *7* | *Clark AB, PI/AFCOMS* | *23,128* |
| 74 | Alameda, CA/Navy | 22,835 |
| 75 | Castle AFB, CA/AFCOMS | 22,760 |
| 76 | Pensacola, FL/Navy | 22,720 |
| 77 | Ft. Gordon, GA/TSA | 22,712 |
| 78 | Ft. Gillem, GA/TSA | *22,156* |
| *8* | *Hickam AFB, HI/AFCOMS* | *22,144* |
| 79 | Bangor, WA/NAVY | 22,000 |
| 80 | Hadnot Point, NC/USMC | 22,000 |
| 81 | Williams AFB, AZ/AFCOMS | 21,986 |
| 82 | Ft. Carson, CO/TSA | 21,864 |
| 83 | New London, CT/Navy | 21,685 |
| 84 | Portsmouth, VA/Navy | 21,346 |
| 85 | Quantico, VA/USMC | 21,300 |
| 86 | Redstone Arsenal, AL/TSA | 21,279 |
| 87 | Edwards AFB, CA/AFCOMS | 21,200 |
| *9* | *Misawa, Japan/AFCOMS* | *21,151* |
| 88 | Homestead AFB, FL/AFCOMS | 20,962 |
| 89 | Granite City AD, IL/TSA | 20,789 |
| *10* | *Osan AB, Korea/AFCOMS* | *20,250* |
| *11* | *Giessen, FRG/TSA* | *20,123** |
| 90 | Ft. Huachuca, AZ/TSA | 20,008 |
| 91 | Plattsburgh AFB, NY/AFCOMS | 19,933 |
| 92 | Grissom AFB, IN/AFCOMS | 19,833 |
| 93 | Jacksonville, FL/Navy | 19,728 |
| 94 | Ft. Polk, LA/TSA | 19,642 |
| 95 | Novato, CA/Navy | 19,500 |
| 96 | Fairchild AFB, *WA/AFCOMS* | 19,311 |
| *12* | *Frankfurt, FRG/TSA* | *19,291** |
| *13* | *Bremerhaven, FRG/TSA* | *19,152** |
| 97 | Ft. Myer, VA/TSA | 19,050 |
| *14* | *Heidelberg, FRG/TSA* | *18,910* |
| 98 | Great Lakes, IN/Navy | 18,700 |
| 99 | Cherry Point, NC/USMC | 18,655 |
| 100 | Ft. Leonard Wood, MO/TSA | 18,512 |
| 101 | Ft. Leavenworth, KS/TSA | 18,437 |
| 102 | Whiteman AFB, MO/AFCOMS | 18,313 |
| 103 | Moffett Field, CA/Navy | 18,280 |
| 104 | Cannon AFB, NM/AFCOMS | 18,240 |
| 105 | Ft. Ord, CA/TSA | 18,190 |
| *15* | *Ft. Buchanan, PR/TSA* | *18,084* |
| 106 | Dyess AFB, TX/AFCOMS | 18,000 |
| 107 | Memphis, TN/Navy | 17,600 |
| 108 | Philadelphia, PA/Navy | 17,502 |
| 109 | Hunter AAF, GA/TSA | 17,500 |
| 110 | K.I. Sawyer AFB, MI/AFCOMS | 17,428 |
| 111 | Ellsworth AFB, SD/AFCOMS | 17,358 |
| *16* | *Berlin (Free Zone), FRG/TSA* | *17,352* |
| *17* | *Vogelweh, FRG/AFCOMS* | *17,349* |
| 112 | Ft. Rucker, AL/TSA | 17,200 |
| 113 | Wurtsmith AFB, MI/AFCOMS | 17,133 |
| 114 | Seymour Johnson AFB, NC/AFCOMS | 17,035 |

*Continued on page 125*

Continued from page 123

| Rank | Store/Parent Organization | Total Sq. Ft. |
|---|---|---|
| 115 | Griffiss AFB, NY/AFCOMS | 17,000 |
| 116 | Kings Bay, GA/Navy | 17,000 |
| 117 | Malmstrom AFB, MT/AFCOMS | 17,000 |
| 118 | Lemoore, CA/Navy | 16,870 |
| 119 | Mare Island, CA/Navy | 16,840 |
| 120 | Moody AFB, GA/AFCOMS | 16,808 |
| *18* | *Sagamihara, Japan/TSA* | *16,792** |
| 121 | Port Hueneme, CA/Navy | 16,700 |
| 122 | Ft. Lewis, WA/TSA | 16,605 |
| 123 | Columbus AFB, MS/AFCOMS | 16,500 |
| 124 | New Cumberland, PA/TSA | 16,490 |
| 125 | Ft. Ben Harrison, IN/TSA | 16,336 |
| 126 | USAF Academy, CO/AFCOMS | 16,238 |
| 127 | Reese AFB, TX/AFCOMS | 16,208 |
| 128 | Gunter AFB, AL/AFCOMS | 16,160 |
| *19* | *Butler, Okinawa, JA/AFCOMS* | *16,100* |
| *20* | *Torrejon AB, Spain/AFCOMS* | *15,893* |
| *21* | *Ft. Richardson, AK/TSA* | *15,713* |
| 129 | Kelly AFB, TX/AFCOMS | 15,710 |
| 130 | New Orleans, LA/Navy | 15,458 |
| *22* | *Fuerth, FRG/TSA* | *15,378** |
| *23* | *Darmstadt, FRG/TSA* | *15,341** |
| 131 | Albany, GA/USMC | 15,325 |
| *24* | *Guam/Navy/AFCOMS* | *15,303* |
| *25* | *Andersen AFB, Guam/AFCOMS* | *15,300* |
| *26* | *Rhein Main AB, FRG/AFCOMS* | *15,300* |
| 132 | Ft. McClellan, AL/TSA | 15,286 |
| 133 | Grand Forks AFB, ND/AFCOMS | 15,250 |
| *27* | *Karlsruhe, FRG/TSA* | *15,197** |
| 134 | Mt. Home AFB, ID/AFCOMS | 15,094 |
| 135 | Shaw AFB, SC/AFCOMS | 15,000 |
| 136 | Ft. Devens, MA/TSA | 14,705 |
| *28* | *Yokosuka, Japan/Navy* | *14,600* |
| *29* | *Yokota, Japan/AFCOMS* | *14,490* |
| 137 | North Island,CA/Navy | 14,415 |
| 138 | Newport, RI/Navy | 14,346 |
| 139 | Aberdeen Prov. Grnds., MD/TSA | 14,229 |
| *30* | *Weisbaden, FRG/TSA* | *14,138** |
| *31* | *Baumholder, FRG/TSA* | *14,055** |
| 140 | Corpus Christi, TX/Navy | 14,024 |
| 141 | F.E. Warren AFB, WY/AFCOMS | 13,963 |
| 142 | George AFB, CA/AFCOMS | 13,943 |
| *32* | *Bitburg AB, FRG/AFCOMS* | *13,877* |
| *33* | *Kaneohe Bay, HI/USMC* | *13,800* |
| 143 | Seattle, WA/Navy | 13,500 |
| 144 | Annapolis, MD/Navy | 13,374 |
| *34* | *RAF Lakenheath, UK/AFCOMS* | *13,320* |
| 145 | San Diego NTC, CA/Navy | 13,238 |
| *35* | *RAF Bentwaters, UK/TSA* | *12,979* |
| 146 | England AFB, LA/AFCOMS | 12,930 |
| 147 | Ft. McNair, DC/TSA | 12,911* |
| *36* | *Schweinfurt, FRG/TSA* | *12,880* |
| 148 | Minot AFB, ND/AFCOMS | 12,872 |
| 149 | Beale AFB, CA/AFCOMS | 12,802 |
| 150 | Parris Island, SC/USMC | 12,737 |
| 151 | Yuma, AZ/USMC | 12,630 |
| *37* | *RAF Upper Heyford, UK/AFCOMS* | *12,624* |
| 152 | Richmond DGSC, VA/TSA | 12,586 |
| 153 | Loring AFB, ME/AFCOMS | 12,404 |
| 154 | Whidbey Island, WA/*Navy* | 12,354 |
| 155 | Bremerton, WA/Navy | 12,352 |
| 156 | Mitchel Field, NY/Navy | 12,290 |
| 157 | Laughlin AFB, TX/AFCOMS | 12,220 |
| 158 | Carlisle Barracks, PA/TSA | 12,072 |
| *38* | *Ansbach, FRG/TSA* | *11,961* |
| 159 | Mayport, FL/Navy | 11,700 |

Continued on page 126

Continued from page 118

| Rank | Store/Parent Organization | Avg. Mo. Sales/SF |
|---|---|---|
| 345 | Indian Sprg. Fld., NV/ AFCOMS | 23 |
| 346 | Cutler, ME/Navy | 23 |
| *347* | *Sasebo, Japan/Navy* | *22* |
| 348 | Dugway Prov. Grnds., UT/TSA | 21 |
| 349 | Camp Merrill, VA/TSA | 20 |
| *350* | *Schwaebisch Hall, FRG/TSA* | *20* |
| 351 | Ft. Fisher AFS, NC/AFCOMS | 19 |
| *352* | *RAF Wethersfield, UK/ AFCOMS* | *19* |
| 353 | Dahlgren, VA/Navy | 19 |
| *354* | *Lualualei, HI/Navy* | *19* |
| 355 | Makah AFS, WA/AFCOMS | 18 |
| *356* | *Bad Toelz, FRG/TSA* | *18* |
| *357* | *Idar Oberstein, FRG/TSA* | *18* |
| *358* | *Jidda, Saudi Arabia/TSA* | *18* |
| 359 | Yuma Prov. Grnds., AZ/TSA | 17 |
| 360 | Port Austin AFS, MI/ AFCOMS | 17 |
| 361 | Calumet AFS, MI/AFCOMS | 16 |
| 362 | Crane, IN/Navy | 16 |
| *363* | *Bad Aibling, FRG/TSA* | *15* |
| *364* | *Exmouth, AUS/Navy* | *15* |
| 365 | North Truro AFS, MA/ AFCOMS | 14 |
| *366* | *Ankara, Turkey/AFCOMS* | *14* |
| *367* | *Chinhae, Korea/Navy* | *14* |
| 368 | Gila Bend Aux. Fld., AZ/ AFCOMS | 12 |
| *369* | *Preum AS, FRG/AFCOMS* | *8* |
| *370* | *Argentia, Nfdlnd./Navy* | *8* |
| *371* | *RAF Sculthorpe, UK/AFCOMS* | *4* |
| *372* | *Trier HA, FRG/AFCOMS* | *3* |
| 373 | Kings Bay, GA/Navy | 3 |
| *374* | *RAF Burtonwood, UK/ AFCOMS* | *2* |
| *375* | *Kinser, Okinawa/AFCOMS* | *0* |

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*Continued from page 125*

| Rank | Store/Parent Organization | Total Sq. Ft. |
|---|---|---|
| 160 | Brunswick, ME/Navy | 11,662 |
| 161 | Edgewood Arsenal, MD/TSA | 11,658 |
| [illegible] | *Corozal, Panama/TSA* | *11,564* |
| 162 | Goodfellow AFB, TX/AFCOMS | 11,440 |
| 163 | Ft. Hamilton, NY/TSA | 11,400 |
| 164 | Myrtle Beach AFB, SC/AFCOMS | 11,272 |
| *40* | *Hanau, FRG/TSA* | *11,147** |
| 165 | Hurlburt AFB, FL/AFCOMS | 11,132 |
| *41* | *Schinnen, NL/TSA* | *11,053* |
| 166 | 29 Palms, CA/USMC | 11.000 |
| *42* | *Bad Kreuznach, FRG/TSA* | *10,937** |
| *43* | *Ashaffenburg, FRG/TSA* | *10,881* |
| *44* | *Ankara, Turkey/AFCOMS* | *10,856* |
| *45* | *Robinson Barracks, FRG/TSA* | *10,735* |
| 167 | Blytheville AFB, AR/AFCOMS | 10,684 |
| *46* | *Chievres, Belgium/TSA* | *10,609* |
| *47* | *Munich, FRG/TSA* | *10,580* |
| *48* | *Camp New Amsterdam, NL/Navy* | *10,579* |
| 168 | Charleston NWS, SC/Navy | 10,540 |
| *49* | *Hahn AB, FRG/AFCOMS* | *10,312* |
| 169 | Ft. Jackson, SC/TSA | 10,280 |
| 170 | Cecil Field, FL/Navy | 10,226 |
| 171 | Gulfport, MS/Navy | 10,076 |
| *50* | *RAF Alconbury, UK/AFCOMS* | *10,000* |
| 172 | Altus AFB, OK/ AFCOMS | 9,952 |
| *51* | *Augsburg, FRG/TSA* | *9,749* |
| 173 | Treasure Island, CA/Navy | 9,696 |
| 174 | Selfridge ANG, MI/TSA | 9,687 |
| *52* | *Barbers Point, HI/Navy* | *9,660* |
| 175 | Vance AFB, OK/AFCOMS | 9,570 |
| *53* | *Kelly Barracks, FRG/TSA* | *9,465* |
| *54* | *Roosevelt Roads, PR/Navy* | *9,440* |
| *55* | *Zweibruecken, FRG/TSA* | *9,430* |
| 176 | Patuxent, MD/Navy | 9,406 |
| *56* | *Kitzingen, FRG/TSA* | *9,353* |
| *57* | *Bamberg, FRG/TSA* | *9,332* |
| *58* | *Heilbronn, FRG/TSA* | *9,328** |
| *59* | *Mannheim, FRG/TSA* | *9,277* |
| 177 | Brooks AFB, TX/AFCOMS | 9,240 |
| 178 | Key West, FL/Navy | 9,139 |
| *60* | *Eielson AFB, AK/AFCOMS* | *9,130* |
| *61* | *Gelnhausen, FRG/TSA* | *9,071** |
| 179 | Tobyhanna AD, PA/TSA | 9,000 |
| *62* | *Rota, Spain/Navy* | *8,716* |
| 180 | Fitzsimons AMC, CO/TSA | 8,712 |
| 181 | Meridian, MS/Navy | 8,702 |
| 182 | Ft. Sheridan, IL/TSA | 8,698 |
| 183 | San Onofre, CA/USMC | 8,674 |
| *63* | *Adak, AK/Navy* | *8,480* |
| 184 | Yuma Prov. Grnds., AZ/TSA | 8,436 |
| *64* | *Makiminato, Okinawa, JA/AFCOMS* | 8,412 |
| *65* | *Grafenwoehr, FRG/TSA* | *8,403** |
| *66* | *Hellenikon AB, Greece/AFCOMS* | *8,395* |
| *67* | *Sembach AB, FRG/AFCOMS* | *8,352* |
| 185 | Scotia, NY/Navy | 8,200 |
| *68* | *Incirlik, Turkey/AFCOMS* | *8,192* |
| 186 | Ft. McPherson, GA/TSA | 8,100 |
| *69* | *Guantanamo Bay, Cuba/Navy* | *8,100* |
| *70* | *Wuerzburg, FRG/TSA* | *8,100* |
| 187 | Vint Hill Farms, VA/TSA | 8,088 |
| *71* | *Ft. Wainwright, AK/TSA* | *8,066* |
| 188 | Ft. Monroe, VA/TSA | 8,049 |
| 189 | Arnold AFB, TN/AFCOMS | 8,040 |
| 190 | Whiting Field, FL/Navy | 7,870 |
| *72* | *Keflavik, Iceland/Navy* | *7,784* |
| *73* | *Spangdahlem AB, FRG/AFCOMS* | *7,664* |
| 191 | Point Mugu, CA/Navy | 7,520 |
| 192 | Stockton, CA/Navy | 7,422 |
| *74* | *RAF Greenham Common, UK/AFCOMS* | *7,213* |
| *75* | *Pirmasens, FRG/TSA* | *7,209** |
| *76* | *Worms, FRG/TSA* | *7,125* |
| 193 | Dugway Prov. Grnds., UT/TSA | 7,056 |
| 194 | Yorktown, VA/Navy | 7,056 |
| *77* | *Subic Bay, PI/Navy* | *7,032* |
| 195 | Rock Island, IL/TSA | 6,944 |
| *78* | *Aviano AB, Italy/Navy* | *6,840* |
| *79* | *Naples, Italy/Navy* | *6,804* |
| 196 | White Sands, NM/TSA | 6,768 |
| *80* | *Argentia, Nflnd., Canada/Navy* | *6,726* |
| *81* | *Fulda, FRG/TSA* | *6,718* |
| 197 | Kingsville, TX/Navy | 6,700 |
| 198 | ARDC (Picatinny), PA/TSA | 6,400 |
| *82* | *Lajes Field, Azores/AFCOMS* | *6,354* |
| 199 | New River, NC/USMC | 6,344 |
| *83* | *Atsugi, Japan/Navy* | *6,326* |
| *84* | *Ft. Greely, AK/TSA* | *6,290* |
| 200 | Barstow, CA/USMC | 6,283 |
| *85* | *San Vito AS, Italy/AFCOMS* | *6,270* |
| *86* | *Bad Nauheim, FRG/TSA* | *6,176* |
| 201 | Oakdale ASC, PA/TSA | 6,000 |
| 202 | Stewart ASE, NY/TSA | 5,900 |
| *87* | *Taegu, Korea/TSA* | *5,900* |
| *88* | *Neu Ulm, FRG/TSA* | *5,717* |
| *89* | *Bermuda*/Navy | *5,607* |
| 203 | Ft. Irwin, CA/TSA | 5,554 |
| *90* | *Livorno, Italy*/TSA | *5,540* |
| 204 | Ft. Ritchie, MD/TSA | 5,500 |
| 205 | Beeville, TX/Navy | 5,464 |
| 206 | West Point, NY/TSA | 5,450 |
| *91* | *RAF Fairford, UK/AFCOMS* | *5,421* |
| *92* | *Kobbe/Howard, Panama/TSA* | *5,400* |
| *93* | *Zaragoza, Spain/AFCOMS* | *5,384* |
| *94* | *Wildflecken, FRG/TSA* | *5,272** |
| *95* | *Izmir, Turkey/AFCOMS* | *5,220* |
| *96* | *Ft. Gulick, Panama/TSA* | *5,200* |
| 207 | Lakehurst, NJ/Navy | 5,075 |
| *97* | *Iwakuni, JA/USMC* | *5,010* |
| *98* | *Dharhan, Saudi Arabia/TSA* | *4,960* |
| *99* | *Holy Loch, UK/Navy* | *4,841* |
| *100* | *RAF Chicksands, UK/AFCOMS* | *4,725* |
| *101* | *Illesheim, FRG/TSA* | *4,701* |
| 208 | Dahlgren, VA/Navy | 4,593 |
| *102* | *Bad Toelz, FRG/TSA* | *4,572* |
| *103* | *Riyadh, Saudi Arabia/TSA* | *4,507* |
| 209 | Sierra AD, CA/TSA | 4,500 |
| *104* | *Cairo, Egypt/TSA* | *4,476* |
| *105* | *Patch Barracks, FRG/SA* | *4,464* |
| *106* | *Ludwigsburg, FRG/TSA* | *4,428* |
| *107* | *Preum AS, FRG/AFCOMS* | *4,409* |
| 210 | Athens, GA/Navy | 4,400 |
| 211 | Ft. Drum, NY/TSA | 4,347 |
| *108* | *Bad Aibling, FRG/TSA* | *4,310* |
| *109* | *Schwaebisch Gmuend, FRG/TSA* | *4,222* |
| *110* | *Iraklion AS, Greece/AFCOMS* | *4,206* |
| *111* | *Sigonella, Italy/Navy* | *4,125* |
| *112* | *Lualualei, HI/Navy* | *4,009* |
| 212 | Fallon, NV/Navy | 4,000 |
| *113* | *RAF Wethersfield, UK/AFCOMS* | *3,945* |
| 213 | China Lake, CA/Navy | 3,927 |
| 214 | Seneca AD, NY/TSA | 3,866 |
| *114* | *Schwaebisch Hall, FRG/TSA* | *3,816* |
| *115* | *Vicenza, Italy/TSA* | *3,732* |
| *116* | *Wertheim, FRG/TSA* | *3,617* |
| *117* | *Edzell, Scotland, UK/Navy* | *3,474* |
| *118* | *Hohenfels, FRG/TSA* | *3,390** |
| *119* | *Bad Hersfeld, FRG/TSA* | *3,390* |
| *120* | *Trier HA, FRG/AFCOMS* | *3,348* |
| *121* | *Garmisch, FRG/TSA* | *3,315* |
| *122* | *Sasebo, Japan/Navy* | *3,208* |
| *123* | *Hessisch-Oldendorf, FRG/AFCOMS* | *3,173* |
| *124* | *RAF Sculthorpe, UK/AFCOMS* | *3,148* |
| 215 | Fort Fisher AFS, NC/AFCOMS | 3,120 |
| *125* | *Jidda, Saudi Arabia/TSA* | *3,106* |
| 216 | Lexington, KY/TSA | 3,081 |
| *126* | *Exmouth, Australia*/Navy | *3,077* |
| 217 | Oakland AB, CA/TSA | 3,072 |
| 218 | Avon Park Range, FL/AFCOMS | 3,012 |
| *127* | *Mainz, FRG/TSA* | *2,990** |
| *128* | *RAF Menwith Hill, UK/AFCOMS* | *2,926* |
| 219 | El Centro, CA/Navy | 2,720 |
| 220 | Gila Bend AAF, AZ/AFCOMS | 2,663 |
| *129* | *Hellenikon Branch, Greece/AFCOMS* | *2,653* |
| 221 | Crane, IN/Navy | 2,650 |
| *130* | *Amberg, FRG/TSA* | *2,640* |
| *131* | *Idar Oberstein, FRG/TSA* | *2,580* |
| *132* | *Oslo, Norway/AFCOMS* | *2,571* |
| *133* | *Goeppingen, FRG/TSA* | *2,547* |
| 222 | North Truro, AFS, MA/AFCOMS | 2,540 |
| *134* | *San Miguel, PI/Navy* | *2,514* |
| *135* | *Chinhae, Korea/Navy* | *2,400* |
| *136* | *Crailsheim, FRG/TSA* | *2,390* |
| *137* | *Bad Kissingen, FRG/AFCOMS* | *2,347* |
| *138* | *Berchtesgaden, FRG/TSA* | *2,296* |
| *139* | *Bindlach, FRG/TSA* | *2,240* |
| 223 | Cutler, ME/Navy | 2,252 |
| *140* | *Erlangen, FRG/TSA* | *2,140* |
| 224 | Winter Harbor, ME/Navy | 1,876 |
| *141* | *Pusan, Korea/TSA* | *1,822* |
| 225 | Indian Spgs. Fld., NV/AFCOMS | 1,721 |
| 226 | Calumet AFS, MI/AFCOMS | 1,670 |
| *142* | *La Maddalena, Italy/Navy* | *1,500* |
| 227 | Port Austin AFS, MI/AFCOMS | 1,490 |
| 228 | Makah AFS, WA/AFCOMS | 1,478 |
| 229 | Camp Merrill, GA/TSA | 1,416 |
| *143* | *Royal Oaks HA, Spain/AFCOMS* | *1,315* |
| *144* | *RAF Burtonwood, UK/AFCOMS* | *1,127* |
| 230 | Holbrook AFB, AZ/AFCOMS | 592 |
| *145* | *Kinser, Okinawa, JA/AFCOMS* | *0* |

## It's A Fact!

Worldwide military commissary sales (unadjusted) have shown an increase in every fiscal year for the past three years.

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SUMMER 1986

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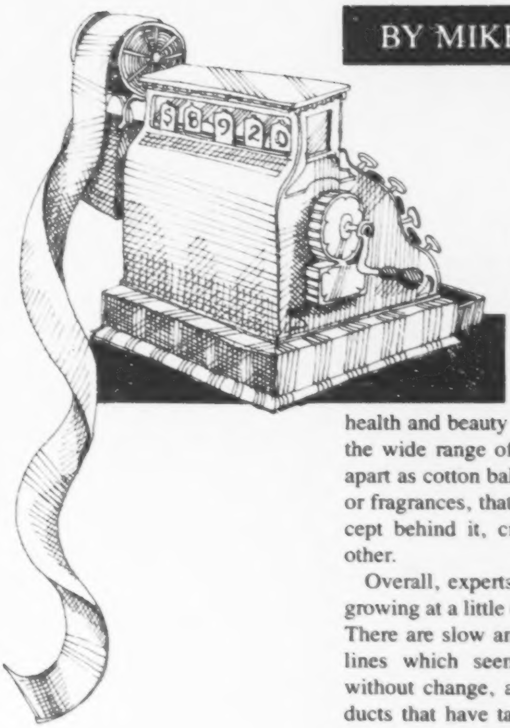
# Are You Ready For Therapeutic?

### BY MIKE HAWKINS



The one word that probably best describes the most successful health and beauty aid products on the market today is "therapeutic." Given the tremendous ground health and beauty aids (HBAs) cover, and the wide range of prices for items as far apart as cotton balls and upscale makeups or fragrances, that one word, and the concept behind it, crops up more than any other.

Overall, experts say the HBA market is growing at a little over nine percent a year. There are slow and slack areas, there are lines which seem to plod right along without change, and there are those products that have taken off like a runaway freight train.

*Mike Hawkins is a San Antonio, TX-based freelance writer. He was on active duty in the U.S. Air Force until last year, serving 11 years as a public affairs specialist. His last six years were spent on assignment to headquarters of the Air Force Commissary Service.*

Military patrons in commissaries and exchanges are buying pretty much what their civilian counterparts buy. Bill Frost, military sales manager with Richardson-Vicks, says that sales in military outlets are "in the same ratio" as those in other stores.

"Military patrons aren't really different in this respect," he feels. "One, or maybe both adults in the family, wear a uniform. But they're receiving the same type of advertising messages as civilians when they're stationed in the United States. Even when they're stationed overseas, they want basically the same types of products that they're used to having at home."

Tom Youngerman, director of special markets for Revlon, agrees. "When comparing Military Audits and SAMI reports in the hair care category, I see some very slight differences. But overall, the buying patterns are awfully close. The major brands in retail are pretty much the same as those in the military."

With that fact in mind and to make it easier to look at some of the major HBA categories and product lines, here's a breakdown of products. It's compiled from observations and comments made by industry analysts, military merchandising specialists, sales professionals, and others.

## Analgesics

Two things stood out in analgesic sales during 1985, according to Oleh Denysyk, pharmaceutical specialist with the consulting firm of Charles H. Kline and Co., Inc., of Fairfield, N.J.

"Almost everyone lost share in 1985 except Tylenol," he says. "They were big winners in the market share, though of course it remains to be seen what the capsule tampering will do to them in 1986.

Two other winners were Advil and Nuprin. They each jumped from about two percent to around eight or nine percent in just a year. That may not sound like a great deal, but in the $1.4 billion category, that makes a big difference."

Denysyk looks for some changes in advertising strategy in this category in 1986. Particularly, he foresees a campaign to educate the American public about the tamper-resistant packaging that's been in use since 1982.

## Antacids

"This is a mature market," Denysyk stresses. "It grew in sales but not units during 1985." Inflation and higher prices were primarily responsible for the sales increase, he says.

The only real action he observed was the increase in market shares for both Tums and Rolaids. He attributes this to their advertising campaigns which highlighted calcium content.

"The public is growing increasingly aware of the therapeutic value of some HBAs. The fact that certain amounts of calcium have beneficial effects in reducing the risks of high blood pressure, colon cancer and osteoporosis helped both Tums and Rolaids."

This tendency towards "proactive" health management is part of the American lifestyle, according to one source. Its thread runs through the whole gamut of HBA sales.

## Antiperspirants & Deodorants

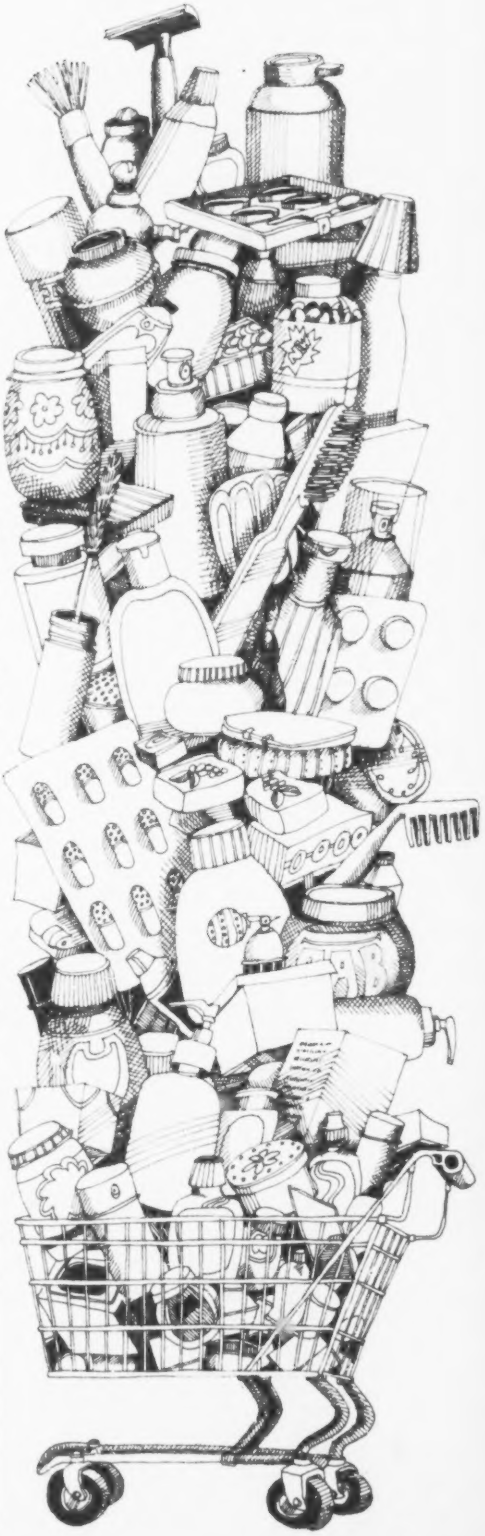
The trend in antiperspirant and deodorant sales continues to be solid and stick products, says Susan Babinsky, also of Kline and Co.

"Aerosols are definitely down. But they're not down as dramatically as in the past. Roll-ons continue to be fairly flat with very little change in market share from 1984."

### Top Five External Analgesics

| Product | Sales Volume* | Share of Market(%) |
|---|---|---|
| Vicks Vapo Rub,1.5 oz. | 2,813,605 | 16.1 |
| Grsls Ben Gay, 1.25 oz. | 2,473,671 | 14.1 |
| Vicks Vapo Rub, 3 oz. | 1,927,543 | 11.1 |
| Aspercreme TB, 3 oz. | 1,369,629 | 7.8 |
| Grsls Ben Gay, 3 oz. | 1,003,397 | 5.7 |
| | Top Five Total Market Share | 54.8% |

*Nov. 84 to Nov. 85
(Source: Towne Oller and Associates, Inc.)



## Bath Additives

Some bath additive products did well in 1985. Babinsky cites the success of bath and shower gels, as well as some of the more traditional additives.

"Overall, the adult-positioned products enjoyed a marked success," she maintains. "The key to sales this year was the therapeutic value of the product." If an item did more than just make the skin smell nice, if it offered to help keep it supple or younger looking, it stood a better chance in the marketplace, even at a somewhat higher price than its competitors.

## Birth Control

For the most part, over-the-counter birth control products had a very good year. Creams and foams weren't moving too well, according to analysts. At about four or five percent, they were just above inflation. But sponges had a phenomenal 20 percent growth rate, as did home pregnancy diagnostic kits. Gels enjoyed a more moderate but still respectable nine to ten percent increase in sales.

## Baby Drugs

While most sales figures of baby drugs or medications are combined with total sales for the various major categories, such as analgesics or skin care, some general statements can be made about sales of HBA's specifically oriented towards infants and small children.

Baby aspirin sales were down because of negative publicity. The well-publicized link between aspirin and Reye's Syndrome in infants had its impact on sales this year. The causal relationship is being expanded now to include a potential link between aspirin use and Reye's in teenagers.

Baby vitamin sales are also declining, according to Kline and Co. They attribute this to the faddish nature of the products.

### Top Five Nasal Sprays

| Product | Sales Volume* | Share of Market (%) |
|---|---|---|
| Afrin, 0.5 oz. | 5,670,970 | 20.5 |
| 4-Way, 0.5 oz. | 3,068,114 | 11.1 |
| Duration, 0.5 oz. | 2,458,951 | 8.9 |
| Dristan Mist, 0.5 oz. | 2,362,773 | 8.5 |
| Afrin, 1.0 oz. | 2,336,706 | 8.4 |
| | Top Five Total Market Share | 57.4% |

*Nov. 84 to Nov. 85
(Source: Towne Oller and Associates, Inc.)

### Top Five Cough Syrups

| Product | Sales Volume* | Share of Market (%) |
|---|---|---|
| Vicks 44D Syrup, 4 oz. | 4,615,704 | 11.0 |
| Robitussin DM, 4 oz. | 3,937,709 | 9.4 |
| Robitussin CF, 4 oz. | 2,363,304 | 5.6 |
| Triaminic Exp., 4 oz. | 2,331,428 | 5.6 |
| Vicks 44 Syrup, 4 oz. | 2,325,500 | 5.5 |
| | Top Five Total Market Share | 37.1% |

*Nov. 84 to Nov. 85
(Source: Towne Oller and Associates, Inc.)

### Top Five Cold Remedies

| Product | Sales Volume* | Share of Market (%) |
|---|---|---|
| Vicks Nyquil, 6 oz. | 10,881,743 | 6.8 |
| Contac, 10 S | 6,156,034 | 3.8 |
| Vicks Nyquil, 10 oz. | 5,818,674 | 3.6 |
| Sudafed (30 mg), 24 ea. | 5,194,849 | 3.2 |
| Dristan Tab, 24 ea. | 5,150,098 | 3.2 |
| | Top Five Total Market Share | 20.6% |

*Nov. 84 to Nov. 85
(Source: Towne Oller and Associates, Inc.)

## Cold Remedies & Nasal Care

Overall, 1985 was a growth year for cold medications. The addition of Benadryl and Dimetapp to the over-the-counter market helped spur sales seven to eight percent. The $1.6 billion category has an annual growth rate of 13.7 percent.

Cough drop sales were good for the "good tasting" brands, according to Denysyk. Ludens and Smith Brothers enjoyed a somewhat better year than their competitors with the more traditional "medicinal" taste.

## Colognes

Both men's and women's colognes were subject to moderate growth in 1985, according to analysts.

"The key issue in the cologne and fragrances market was diversion," said Babinsky at Kline and Co. "There's the legal diversion which some upscale names are practicing, positioning their products which were once reserved for select department stores in smaller, less expensive outlets. And there's the illegal diversion in which products end up in stores they shouldn't be sold through." That type of diversion hurts industry sales overall, since it makes the products available at prices which can oftentimes undercut even exchanges, according to one source.

## Dental Care

It's no secret that pumps continued to dominate the market for toothpaste this year. Consumers are just willing to pay the premium to avoid the mess. The pumps have captured a 15 percent market share, up six percent from last year. No one sees that trend slowing.

For the future, manufacturers are challenged to meet new guidelines set down by the American Dental Association. The ADA has established a stringent set of criteria that will allow products to qualify as chemical plaque removers, according to Kline and Co. Currently, none of the products on the market meet the standards. They are billed as mechanical plaque removers, says Babinsky. New technology is called for, and expected, to fill the gap.

Other winners in the dental care market were therapeutic mouthwashes and rinses. Those offering increased cavity fighting potential like Johnson and Johnson's Act gave the customers what they wanted.

In the related dental care market, sales were pretty flat. That was especially true in the soft goods market, which comprises the bulk of sales. Units declined there, but the old standards still kept the major portion of the market. Fixodent remained the number-one denture adhesive cream and Fasteeth kept the top spot in adhesive powders. Together, they accounted for 50 percent of the category's sales.

## Eyecare

It was a great year for contact lens care products with a 15 percent increase in sales. The continued popularity of contact lenses promises to bolster this trend. Alcon, Barnes Hind, and Bausch and Lomb remain fixed as the solid leaders in contact lens care products.

Non-contact lens wearers also bought more in the way of eye care products last year. Increased promotions played a large part in the ten percent growth of sales for these items.

## Feminine Hygiene

This was a pretty flat market, most agree. There are some changes occurring that may help spur sales. The marketing strategy continues to target younger, more active women.

### Some of the Winners for 1985

| Product Category | Increased Market Share, 1984–1985 |
|---|---|
| Spermicidal Sponges | 20% |
| Home Pregnancy Diagnostic Kits | 20% |
| Spermicidal Gels | 10% |
| Cold Remedies | 13.7% |
| Contact Lens Care | 15% |
| Eye Care | 10% |
| Bulk Laxatives | 13% |

Data courtesy Charles H. Kline & Co., Inc.

## Footcare

Dr. Scholls is the undisputed leader here, but sales growth has been nothing to dance about at just around five to six percent, according to Denysyk.

In an effort to broaden the market appeal, Scholls is revamping their Foot Beauty line of foot "pampering" products. The line, renamed Smooth Tough, is receiving an entirely new look and will actually be placed on the shelves away from the other foot care products. The hope here is to upgrade the "pedestrian" image of footcare, says one source.

## Hair Care

The big news in hair care products for 1985 was styling mousses and gels. Each item doubled in sales in the last year, with styling mousses taking far and away the majority of sales.

There was little growth in the shampoo and conditioner market, says Babinsky at Kline and Co.

"Price and value are still the key ingredients of the customer's buying decision," she emphasizes. "The leaders remain pretty much the same."

Youngerman at Revlon says the biggest change in shampoos and conditioners was the tremendous number of new products introduced in the last 18 months. The movement to "segment" the market into products specifically formulated for different hair styles is having an impact on sales, too.

"The category now has several brands of shampoos specifically formulated for permed hair. We have one for people who swim a lot and with more active lifestyles in general," says Youngerman. He believes this influx of new shampoos is giving the consumer better choices.

The other trend in hair care is also being felt throughout many categories of health and beauty aids. That's the tendency to package "systems" of products. Patrons now find shampoo and conditioner systems that are chemically formulated to work together. This convenience is being extended by Revlon with their Sun and Sport line that will include a shampoo, conditioner and mousse in the system.

There are industry watchers who, like Babinsky, see the market revolving around the solid leaders. One commented that the hair care market was very "faddy" and would fluctuate but return to the "old standards." Whichever philosophy rules will take control of a market that showed sales of $2.6 billion in 1984.

**In hair care, products are promoted as "systems."**

Other hair care products received mixed reviews during 1985. Permanents, for instance, didn't fare too well. They've dropped in both sales and units for the last two years. Hair colorings have been flat, but there may be some hope for a surge in 1986. Marketing to a younger position the hair coloring products may make greater inroads as "spot colorings." New styles allow greater use of colors in hair among the younger set.

## Laxatives

There's not a great deal to be said about changes in this category during 1985. Sales were good. Bulk laxatives were up 12 to 13 percent while others rose about 7 percent.

## Linaments

Linaments enjoyed a fairly good year. Appealing to the "social consciousness" of sports enthusiasts continued to have a positive effect on sales, according to Denysyk.

## Medicated Cleansers & Acne Preparations

Kline and Co. reports the market is flat, particularly in unit sales. Clearasil remains the top seller in acne preparations with a 32 percent share.

## Shaving Accessories

As with many others, therapeutic conditioning is the trend in what some see as a growing market.

Bill Frost at Richardson-Vicks believes that men now want to take care of their skin. Shaving products should offer some benefit besides just a sharp sting and a nice smell.

"In a survey taken before we introduced our Saxon line," he said, "20 percent of the men responding said they had used their wives' Oil of Olay as a skin conditioner. They want the benefits of healthy skin as much as women do."

This may be true, but others still decry the use of the word "conditioner" when talking about men's products. Skin "balm" better fits the male ego, says one source.

Still others aren't as impressed with the future of men's shaving/skin care products. Susan Babinsky attributes the current spate of sales and consumer interest to increased advertising. When the ads are gone, demand will probably be gone too, she believes. Men still buy products according to whether or not they like the fragrance, and any attempt to educate men to the concept of skin care will take a lot of effort.

Another milestone in the shaving products category this year was Gillette's Brush Plus. Men get the luxury of a brush shave without the inconvenience and mess associated with the old brush, soap and cup method. Convenience and luxury in one package is a tough competitor these days.

## Makeup

"A pretty steady performer" is the Kline and Co. assessment of the makeup market.

## How do they Stack Up?

Military exchanges and commissaries are different in nature. They sell many of the same items, but with different emphasis. Interviews with military merchandising specialists, sales representatives and brokers yield different perspectives on how the commissaries and exchanges are doing the job of meeting their patrons' health and beauty aid needs.

Predictably, the representatives from the various military resale agencies are doing the best they can. No one expects any less of them. But what they see as the "very best" and what industry would like to see are often two different things.

For instance, one national sales representative commented that health and beauty aid items were often treated as "adopted stepchildren." He stuck up for commissaries, went to bat for them as the "second most valuable entitlement to military men and women, right after health care." He did his best to describe just where and how the commissaries are doing one heck of a good job, but . . . they could do this one a bit better.

Another comment came from a broker: "Exchanges merchandise health and beauty aids much more extensively than commissaries," he said. "Everyone realizes that commissaries are food-oriented. We accept that. But they're also savings-oriented. They don't realize the value of having more health and beauty aids in the store at cost plus five percent. That's a big savings for the military family."

"Civilian food chains have become much more cognizant of the role of health and beauty aids," said one former military merchandising specialist who now deals exclusively with civilian markets. "Commissaries need to take that route. They need to devote more space and have a larger assortment."

"Exchanges carry very high class lines these days," said Bill Frost, military sales manager at Richardson-Vicks. "Exchanges are becoming more and more eager to be on the leading edge when it comes to stocking health and beauty aid items, even upscale items, to please their customers."

Frost says that many times, exchanges are getting new items in stock almost as quickly as civilian stores.

Can the same be said for commissaries?

"No," said one regional sales manager who preferred not to be identified. "There's been a lot of talk about it. We go to [American Logistics Association-sponsored] nationals and hear the various commissary spokesmen tell us they want these new items ASAP. And it is getting better, I have to say. It used to be like moving a tortoise to get them to accept new HBAs. They're responding better. But there's room for improvement."

The same person compared the Army and Air Force Exchange Service (AAFES) to the Navy exchange system.

"AAFES has a centralized, hands-on control method that keeps the stock assortment uniform. They also make it easier to introduce new items.

"The Navy, although they usually keep the stock assortment pretty close, is a bit more confusing with their decentralized control."

What about commissaries?

"The Army and Air Force commissaries treat health and beauty aids much more strongly than the Navy," said one source. "They have a wider selection. Their policies are much more open when it comes to introducing new products. The Navy system that gives you 'windows' of opportunity means there are delays in getting new products into the system, sometimes as much as six months."

He admits that there are provisions whereby a new item can be presented out of its proper window, "but it's got to be a real whiz-bang" product, he says.

Another industry representative questioned the fairness of Navy's product review capabilities during the window. He knows the people responsible are doing the very best they can, but wonders if there's not a chance of some undue stress on Navy personnel when they have a great many products to review in a set amount of time. "It seems to be either drought or flood," he said, "and those Navy people have got to really have it tough, sometimes."

So who does the best job, overall, of marketing health and beauty aid products to the military patron? There's no consensus, there may be no answer.

"I'd rate the Air Force as number one in being responsive to the HBA market," said one representative.

"In the past, I would have answered AFCOMS is the strongest when it comes to aggressive marketing," said another. "But not today. They've slid lately. They seem to be reluctant to display large quantities. Inventory control gets in the way, I guess."

One more sales representative said it all seemed to depend upon the individual store. Some Navy and Marine stores are excellent, he commented. Others just don't seem to care about their appearance, their displays, their merchandising techniques. And, while the Army and Air Force overall are a bit more consistent, it all boils down to whether or not the man or woman in charge of the store cares enough to do the best possible job.

Now that, perhaps, is something everyone can agree on. —M.H.

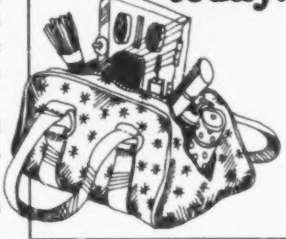
Maybelline and Cover Girl are the obvious front runners in the mass market. But there are some changes taking place.

To borrow an overworked data processor's phrase, "user friendly" describes many of the packaging twists attracting women to makeup today.

For the more than two-thirds of women age 25 to 44 in the workforce, convenience is almost as important to them as quality and price. With less time to spend selecting and applying their makeup, women are more than happy to take advantage of the systems containing complementary shades of blush, eye colors and lipsticks.

Pfizer, Inc.'s Coty responded to this need last December with their Color Focus kits which have three eye shadows, a complementary shade of blush and lipstick in one easily carried package.

**"User friendly" describes women's makeup today.**



Along the same convenient lines, Chesebrough-Pond's Aziza Polishing Pen has made deep inroads into the fingernail polish market. In its first year, from November 1984 to November 1985, it captured almost nine percent of nail care sales, according to Kline and Co. figures. Sales during that period were $32 million. It's another case of the consumer willing to spend more for convenience and quality.

"Therapeutic" has to figure into the makeup market. Makeup today needs to do more than just cover blemishes. It should also do something good for the skin. This is just part of the trend today, said a spokesman at Revlon. Men and women alike are more aware of and concerned with their appearance and their health. They're willing to pay the price for both. And since industry studies confirm that nearly one-third of women today have a form of acne, makeup that helps treat that condition is a sure winner.

As a result, while the words "hypo-allergenic" may not be enough to sell a product, they're not the turn-off they once were. Many companies steer clear of the phrase because they're afraid of the stigma that some still associate with hypo-allergenic.

"Only people with serious skin problems used hypo-allergenic makeup," said one spokesman. "That's changing, but the words still bother some people."

They certainly don't bother Almay, long the leader in hypo-allergenic makeups. Almay's sales ran at a steady clip up until 1983 when, according to one source, they "took off like a shot." Their sales have doubled since then.

## Ethnic Health & Beauty Aids: Are commissaries and exchanges meeting everyone's needs?

Unanimously, the service resale organizations feel that they're doing their best to meet the needs of their ethnic members when it comes to health and beauty aids products.

They each cite the item selection process as a system that's not only flexible enough to cater to everyone's shopping patterns, but open to input from customers, too.

The Air Force Commissary Service (AFCOMS) uses customer suggestion boxes, commissary advisory councils at each base (with representatives from the local Social Actions Office to make sure ethnic needs are considered properly), and Action Line cards sent from customers straight to the AFCOMS commander. Each of these can have an impact on items selected for stock.

The other services have similar methods of hearing from their customers. But by and large, the most often cited means of getting the right products to their right location is the store manager. The store manager is on the spot, knows the customer mix and watches the item movement. That's the key to meeting patron needs.

At the U.S. Army Troop Support Agency (TSA), spokesman Bob Hunt said ethnic HBAs were well represented in their stores and customer perference drove the stock selection.

One industry spokesman, who preferred anonymity, wasn't quite as sure that ethnic patrons were getting their fair share of attention in the the health and beauty aids sections of commissaries. He sees lots of room for improvement.

"We tried to market our line of ethnic products through the commissaries several years ago with no results. There just wasn't enough movement to justify staying on the stockage list."

Everybody keeps harping on about the need for more ethnic products in the commissaries, he says, but not much gets done about it. The high unit cost of some items would make them real bargains for commissary customers. But the shelf space, the point of sale advertising, the buildup to get sales going just isn't there. As a result, exchanges do most of this company's ethnic business.

That, he stresses, applies to all services. Another industry representative echoed those sentiments. "The commissary's attitude about ethnic products seems to be something like, 'If we don't have it, that's the way it is. If you want it, go to the exchange.' That just doesn't wash all the time," he claims, especially when today's shoppers want to get as much done in one spot as possible.

If, while shopping at the commissary for what they consider to be grocery items, customers find a trip to the exchange is necessary for one or two products, aren't they likely to take their business elsewhere next time? That question was posed by another HBA representative, alluding to the current trend towards one-stop shopping. "Remember," he said, "the trend today is often to pay more for convenience. Is that so far fetched?"

Makeup is a $2 billion-a-year market that's not likely to slow down. Analysts look for continued innovations in packaging and technology to spur sales on.

## Skin Care

Hand and body lotions, suntan lotions and sun screens, face creams and lip ointments can all fall within the broad category of skin care. The story here is almost a repeat of the makeup story. Both in the mass and upscale markets, consumers want products that do something good for their skin. Thus, says Susan Babinsky, many of the old standards may not be charging ahead at the same pace as some of the newer, therapeutically-positioned brands. Oil of Olay remains the number-one seller, though, with 37 percent of market share.

An increased awareness of the harmful effects of the sun is boosting seasonal sunscreen sales, says one spokesman. But women aren't willing to stay out of the sun. They want to "have their cake and eat it too." This has prompted several manufacturers to add sunscreen to their makeup and skin care products. So far, sales are "promising."

## Vitamins

The vitamin market overall has lost share in dollars, according to Kline and Co.'s Denysyk. The four or five percent increase last year is just above inflation. He attributes the remainder to price increase.

## Soaps

The last great inroad into hand and body soaps was engineered by soft soaps. The soft soap pump now has a secure spot in homes throughout America, said one military merchandising specialist. But sales of soft soaps haven't usurped bars, he insists, just supplemented them. He sees the two soaps as having entirely different markets.

So what's new in soaps today? The trend, predictably, is towards those with moisturizing properties. Products that offer some sort of skin treatment, as opposed to simple cleanliness, are advancing.

## What's It All Mean?

It's fairly simple to sum all of this up. Consumers today are picky. They want to be healthy, not just healthy looking. They're willing to pay more for products that offer "good for you" ingredients. Therapeutic is the magic word. When shoppers look through the health and beauty aid section of their commissary or exchange, their calculations of a product's value include its effect on their mental and physical well-being. Everyone wants to live longer. Everyone wants to enjoy life more. Everyone wants to become and remain healthy, to feel good about themselves. When a product can help them accomplish these things, they'll pay the price. At least until something better comes along. ■

## A Dose on Vitamins

The controversy surrounding vitamins and the claims made by vitamin advocates tend to make them an "up and down" proposition, according to one industry spokesman. As the public sways back and forth between the claims of manufacturers and detractors, they are likely to buy one day and ignore the next, he explained.

It's no wonder consumers are subject to change, when they have on the one hand, such notables as Linus Pauling, Nobel Laureate, advocating a strict regimen of vitamins. Pauling, an American chemist who pioneered work in sickle cell anemia in 1945 and in 1951 proposed (with Robert Corey) the alpha helix structure of proteins, is infinitely more well-known for his outspoken support of Vitamin C in megadoses as a general measure to maintain health. Pauling proposes that large amounts of most vitamins can have beneficial effects. As a chemist, he explains that there is no difference between so-called "natural" and "synthetic" vitamins. They are each composed of the same elements.

On the other hand, the public is given to understand by such notable physical fitness experts as Jack Lalane that natural vitamins are better.

Then there are consumer's groups which do their anatomy and physiology homework. The human body can only use a certain amount of each vitamin, they say. But is the average man, woman or child in the street getting the proper amount of each vitamin? That's the question that bothers most consumers today when confronted with the question of whether or not to purchase vitamins. Fad or confusion? It's hard to tell.

A March 1986 story in *Consumer Reports* entitled "The Vitamin Pushers" tried to clear up the murky waters of vitamin requirements. In essence, they took a stand deploring what they had called the "overselling of vitamins" to Americans in their premier issue 50 years earlier.

So what's the long and short of it? In military commissaries, at least, vitamin sales are good. A U.S. Army Troop Support Agency (TSA) spokesman says demand for all types of vitamins is continuing to grow. The latest years he had a track available for were 1982 to 1983, when vitamin sales rose a whopping 30 percent.

"We make sure to carry all types of vitamins in ample supply," he said. The other services, while not reporting the same increase, had similar sales stories.

And vitamin manufacturers and marketers aren't babes-in-the-woods when it comes to packaging their products. Besides the mini-market of children's vitamins, they've come up with specially merchandised "systems" of vitamins for people who are under a great deal of physical stress. Then there are vitamins directed at those who exercise regularly. That's different from the "physical stress" category (in most cases) because it assumes a more active lifestyle. Simple stress-related vitamins may be targeted towards the deskbound nine-to-fiver.

Is anybody buying these claims? It depends on who you talk to. Oleh Denysyk, a pharmaceutical specialist with the consulting firm of Charles H. Kline and Co., Inc., says vitamin sales overall are flat, and there's little indication they'll continue to do otherwise. In 1985, they lost dollar share, he emphasizes.

"That may be so," said one source at AFCOMS, "but we're still selling an awful lot of them." —M.H.

invasion. "It brought with it a very good, constructive readjustment.," explains CAPT Allen Wood, Director of Recreational Services at the Naval Military Personnel Command in Washington, D.C. "Some people were awakened," says Wood, who sees the fast food challenge as having strengthened Navy's club food programs.

"Today there are many exciting new additions to club menus, including Tex-Mex, pita bread sandwiches, pizza and spicy-fried chicken selections," he notes.

Although sales at Navy's enlisted clubs initially withered by 40-50% in the face of the fast food challenge, the nosedive had turned around dramatically within the first six months, reporting only about a ten percent dip in revenues.

Wood attributes much of the improvement to a wider and more interesting selection of foods now offered at clubs.

## Turnaround Conference

With the same fighting spirit, the Army in March this year sponsored a week-long "Clubs Turnaround Conference." According to Colonel Emroy M. Gehlsen, Chief of Leisure Sales and Service, and William Bartelt, Branch Chief of Business Operations, both at the U.S. Army Community and Family Support Center (USAFSC), the conference was aimed at club revitalization.

"We wanted to develop strategies to make clubs more profitable by focusing on the food and service," says Gehlsen. The Army's plan is to more quickly respond to the latest trends in the food service industry, to focus on better personnel training, and to try to retain quality people with more attractive rewards.

Army clubs have been challenged to achieve a five precent net income for 1986, and according to Gehlsen, most of it will be garnered from labor-saving expenses and the adoption of new ideas. Gehlsen gave his reassurance that this profit goal does not sound the death-knell for clubs that just can't, and maybe never will, achieve a profit. "Although some clubs may be consolidated, there will be cases where we will continue to subsidize clubs," Gehlsen says.

To achieve this profit goal, Gehlsen explains, "we want club managers to get out of the office and spend at least 30% of their time selling club programs. We want them to talk to their constituents, talk to the unit managers, and make sales pitches to fill

## Army's Club Report Card

The Army's most recent MWR customer survey revealed a wealth of information about Army's club patrons, their likes and dislikes, and their "patronization" patterns. The August, 1984 1984 survey included 32,545 participants. Here follows several of the more interesting questions and surprising responses to the comprehensively detailed questionnaire. The Army's comments are also included.

- I use the Army Club at my post, installation, or military community for food, beverages, and/or entertainment:

| | E1-E4 | E5-E9 | CO-WO |
|---|---|---|---|
| Not at all | 30% | 26% | 12% |
| Less than once a month | 22 | 30 | 29 |
| 1-3 times a month | 23 | 25 | 34 |
| 4-7 times a month | 12 | 10 | 14 |
| 8 or more times a month | 13 | 9 | 11 |

Comments: Use of Army clubs is reasonably consistent among the ranks, except that the percentages for enlisted who do not use the club at all is twice as high as that of Warrant Officers/Officers. Army-wide projections based on these percentages would result in almost 118,000 E1-E4 soldiers, 72,000 E5-E9 soldiers and 12,800 WO/OFF who never use Army clubs.

Over one-half of all soldiers use Army clubs less than once a month (including not at all) and over 75% use clubs less than once a week. This leaves only 25% of soldiers who use the club at least weekly.

- What are your reasons for NOT using the Army Club more often?

| | E1-E4 | E5-E9 | CO-WO |
|---|---|---|---|
| NA-use club if time allows | 42% | 41% | 37% |
| Service of club personnel | 6 | 10 | 18 |
| Quality of food, beverage | 8 | 13 | 31 |
| Prices of food, beverage | 9 | 11 | 21 |
| Type of entertainment | 23 | 26 | 29 |
| Ethnic mix | 9 | 8 | 3 |
| No family activities | 5 | 14 | 0 |
| Decor, appearance | 5 | 7 | 11 |
| Attitude of the mgmt | 6 | 9 | 12 |
| Club is too far away | 6 | 8 | 15 |
| Club is too crowded | 15 | 14 | 5 |
| Not know of the club | 2 | .4 | 0 |
| No club eligible to use | 1 | .6 | .6 |
| Not eligible to use a club | 2 | .4 | .3 |
| Other | 12 | 12 | 10 |

Comments: Service members were asked to check all responses that applied.

For E1-E4s, the primary reason for not using the club was the type of entertainment. This was followed by the club being too crowded and the price of food and beverage. For E5-E9s, the type of entertainment offered was selected the most times, followed by lack of, or not enough, family activities. Their third most frequently chosen response was the club being too crowded.

WO and Officers selected the quality of food and beverage as their most often cited reason for not using Army clubs, followed by the type of entertainment and the price of food and beverage.

- I use civilian places for food, beverage, and/or entertainment:

| | E1-E4 | E5-E9 | CO-WO |
|---|---|---|---|
| Not at all | 14% | 14% | 5% |
| Less than once a month | 12 | 16 | 11 |
| 1-3 times a month | 28 | 34 | 36 |
| 4-7 times a month | 21 | 19 | 29 |
| 8 or more times a month | 27 | 16 | 19 |

Comments: It is interesting to note that E1-E4s patronize civilian places "eight or more times per month" which is at a rate higher than that of E5-E9s and WO/OFF, but is less than those groups for almost every other "out" category. Also, the numbers of both enlisted categories who do not use civilian places at all is at a rate that is three times higher than that of officers.

*Continued on page 60*

those special event rooms."

As a strategy to bring the latest, hot, new ideas to club managers quickly, the Army will hire the services of a national marketing firm. The plan is to send out monthly marketing packages to Army clubs with the latest creative ideas on how to boost sales.

## Aweigh With Smart Compass

The Navy's appropriately-named Smart Compass program is the latest example of what is basic to all service organizations: the need to pinpoint just what it is that users want.

CAPT Wood is very enthusiastic about the program because it will yield valuable information about Navy recreational facilities and what Navy personnel do or don't want.

"Our new Smart Compass Program is actually a needs assessment survey," he explains. "In the past, the military often guessed at what their people wanted. Often it was up to the base commander to decide which were the most essential recreational facilities. But now, with Smart Compass, developed for the Navy at the University of Georgia, we have a formal survey tool to help us guage what services to provide to whom, at what locations, and at what cost."

About one-third of the Navy was surveyed last fall using the new marketing tool. And as the Congressional debate continues to percolate over NAF building programs, this type of statistical indicator will objectively and accurately identify the most essential recreational needs.

## The Bottom Line

It is a period of transition for clubs. Some will gain, others will lose, and yet others will consolidate. Of the future, Jim Waters of the House Armed Services Committee believes "we will probably develop a new concept of what a military club is. Twenty years ago, five percent of the military population was married; today 54% are married. It makes no sense to develop new clubs for singles if one-half of the base population lives five miles from the base and goes home every night. We may opt instead for community clubs, with rooms for singles, marrieds, or by age groups." It's hard to tell where it will eventually wash ashore.

Club managers understandably feel isolated and frustrated. They must deal with a multitude of operational changes which in some way, large or small, have an adverse impact on their bottom lines. Managers must deal with the cutbacks and deteriorating facilities as best they can and, to the extent possible, retain good people.

Despite the obstacles, these gutsy managers just keep plugging away. Whether it's is upgrading the food, keeping up with new restaurant trends, instituting a better rewards program for productive employees, or imaginatively providing matching-fund grants for club managers who want to try out new ideas, military clubs have not yet given up the battle. "We're not on the dinosaur list yet," confirms Gehlsen.

One thing is for certain. To withstand gale force winds—and survive and prosper—is worth blowing a horn about. ■

## Army's Club Report

*Continued from page 58*

- What are your reasons for using civilian places?

| | E1-E4 | E5-E9 | CO-WO |
|---|---|---|---|
| N/A Do not use civ places | 14% | 15% | 5% |
| Quality of food, beverage | 31 | 32 | 52 |
| Price of food, beverages | 12 | 14 | 29 |
| Get away from military | 57 | 45 | 43 |
| To try new places | 41 | 40 | 56 |
| Meet non-military | 37 | 25 | 21 |
| Cheaper entertainment | 6 | 6 | 8 |
| Atmosphere, decor | 28 | 28 | 39 |
| Clean facilities | 9 | 10 | 13 |
| Entertainment offered | 29 | 27 | 32 |
| Closer to home | 10 | 15 | 24 |
| More convenient hours | 20 | 17 | 20 |
| Use credit cards | 3 | 9 | 19 |
| Quality service; attitude of employees | 14 | 17 | 24 |
| Other | 3 | 4 | 5 |

Comments: The two most often chosen responses for enlisted soldiers were first, "to get away from the military environment" and second, "to try new places." WO/OFF selected "to try new places" as their number one choice, followed by "the quality of food and beverage." Third most selected response for E1-E4s was "to meet non-military people;" for E5-E9s "quality of food and beverages," and for WO/OFF, "to get away from the military environment." Getting away from the military environment was selected by all ranks, as one of their first three choices, as was trying new places.

- What are your reasons for using the local Army Club?

| | E1-E4 | E5-E9 | CO-WO |
|---|---|---|---|
| Quality of food | 12% | 13% | 12% |
| Quality of beverage | 12 | 11 | 7 |
| Price of food | 20 | 25 | 22 |
| Price of beverage | 28 | 30 | 25 |
| To relax, socialize | 48 | 45 | 45 |
| Near food, beverages, entertainment | 31 | 21 | 27 |
| Atmosphere, decor | 5 | 6 | 5 |
| Check cashing service | 12 | 20 | 46 |
| Meet opposite sex | 24 | 14 | 6 |
| Quality entertainment | 8 | 8 | 3 |
| Use credit cards | .7 | .6 | 2 |
| Ethnic mix | 6 | 7 | 2 |
| Quality service; attitude of employees | 4 | 5 | 4 |
| Close to home | 20 | 17 | 18 |
| Other | 6 | 10 | 18 |

Comments: Nearly half of all soldiers selected "to relax and socialize" as their number one reason for using the local Army club. Officers placed a slightly greater importance on the check cashing services. Another choice picked frequently, was that the club is the nearest place for food, beverage and entertainment; this shows the importance of location to soldiers who decide to go out for the evening.

Other more frequently selected responses were the price of the food and beverages, close to home, and meeting the opposite sex.

Least selected reasons were quality of entertainment, quality of service/employee attitudes, and atmosphere and decor.

## 5th Annual

# Exchange Sales Report

BY ALAN GOLDSTEIN

Recent months have been filled with conversation and articles about the "zero growth" sales performance of the military exchange systems in fiscal 1985.

On an aggregate basis, that is taking into consideration all the business earnings associated with and falling under the canopy of the base or post exchange, including the food and a dozen or more similar service departments, that's probably true. But retail department sales, the bread and butter of the larger companies doing business with military exchanges, weren't as sour as many proclaim.

It's true that the Navy's exchange system alone reported an unadjusted overall sales loss of 1.3%, based on preliminary figures. Compared to 1984, CONUS retail sales decreased 0.9%, while overseas retail sales were down 0.7%. Tobacco sales were down by 4.5%, soft goods were softer by 0.5%, but consumer electronics grew by 1.9%. And several smaller retail departments showed healthy growth, including fragrances (9.8%), candy (6.1%), jewelry (6.0%), toiletries (3.3%), and books & periodicals (2.9%).

At the Army and Air Force Exchange Service (AAFES), much of the blame for slack sales was attributed to competition from too many stores that between them have managed to leave customers "sale-conditioned"—that is, if the goods aren't on sale, they don't buy them

But AAFES' worldwide retail department sales actually grew by a not-too-discouraging 12% compared to fiscal 1984. And that growth occurred despite a 12% sales decline in the DPSC merchandise (uniforms and accessories) department, which accounts for 4% of AAFES' worldwide retail sales.

Growth spurts were reported in two AAFES departments—cosmetics and fragrances and precious/semi-precious jewelry—which posted sales gains of 11% and 19%, respectively, and together account for 5% of worldwide retail sales.

There were several "soft" areas, however, where sales went beyond soft. Compared to 1984, some of the largest worldwide retail sales declines were turned in by the following: outdoor living (8%), furniture/rugs (7%), giftware (7%), sporting goods/camping supplies (6%), tobacco products (4%), and traffic/major appliances (4%).

The bottom line for military marketers is that CONUS retail sales—where the lion's share of the exchange business resides—grew by 17% over 1984. Four AAFES CONUS regions reported increases of 15% or more, and the fifth posted a healthy 10% increase.

Even the Coast Guard and Marine Corps systems held their own, with 2% and 1% worldwide total sales increases, respectively. The Coast Guard saw its retail sales grow by 2.5%, but the Marines—like the Navy—suffered a retail sales decline, totaling 1.5%.

The outlook for fiscal 1986 is optimistic. But the key to the future of all the systems will be to find ways to reach their customers, erode their "sale conditioning" mindset, and make them aware of their invaluable exchange shopping benefit. ■

*Alan Goldstein is the American Logistics Association's Director of Information & Research. He is also Editor of* INTERSERVICE *magazine.*

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## AAFES Exchange Sales—FY 85

### Summary of Sales by Retail Department ($ In Thousands)

| Department/Dept. Code | Domestic $ | % | Overseas $ | % | Mail Order $ | % | Worldwide $ | % | % Change 85/84 |
|---|---|---|---|---|---|---|---|---|---|
| Automotive Labor/03 | 10,054 | 0 | 1,660 | 0 | 0 | 0 | 11,715 | 0 | – |
| Automotive/01 | 70,872 | 3 | 33,006 | 2 | 73 | 0 | 103,952 | 3 | 4 |
| Beer & Sodas/23 | 120,134 | 5 | 71,136 | 5 | 0 | 0 | 191,270 | 5 | 4 |
| Boyswear/74 | 26,506 | 1 | 14,827 | 1 | 0 | 0 | 41,334 | 1 | −4 |
| Cleaning Supplies/83 | 33,778 | 1 | 16,951 | 1 | 71 | 0 | 50,800 | 1 | 4 |
| Cosmetics & Fragrances/34 | 65,115 | 3 | 22,544 | 2 | 0 | 0 | 87,659 | 2 | 11 |
| DPSC Merchandise/19 | 107,238 | 4 | 33,644 | 2 | 0 | 0 | 140,882 | 4 | −12 |
| Dinnerware & Flatware/80 | 10,397 | 0 | 6,783 | 0 | 2,967 | 5 | 20,147 | 1 | −5 |
| Food & Juices/20 | 143,162 | 6 | 94,421 | 7 | 99 | 0 | 237,682 | 6 | 0 |
| Footwear/77 | 85,657 | 4 | 38,479 | 3 | 485 | 1 | 124,621 | 3 | 4 |
| Furniture & Rugs/86 | 19,152 | 1 | 27,267 | 2 | 2,140 | 4 | 48,560 | 1 | −7 |
| Gasoline/02 | 297,777 | 12 | 118,742 | 8 | 0 | 0 | 416,519 | 11 | – |
| Giftware/82 | 23,117 | 1 | 19,036 | 1 | 5,628 | 10 | 47,781 | 1 | −7 |
| Girlswear/75 | 20,128 | 1 | 13,165 | 1 | 10 | 0 | 33,304 | 1 | 2 |
| Hardware/87 | 53,007 | 2 | 13,758 | 1 | 108 | 0 | 66,873 | 2 | 1 |
| Health & Beauty Aids/30 | 131,769 | 5 | 66,300 | 5 | 399 | 1 | 198,468 | 5 | −1 |
| Home Entertainment/97 | 132,391 | 5 | 316,252 | 22 | 27,619 | 48 | 476,262 | 12 | 0 |
| Infants' & Toddlers' Wear/76 | 31,074 | 1 | 18,916 | 1 | 14 | 0 | 50,004 | 1 | 3 |
| Jewelery/50 | 26,381 | 1 | 12,627 | 1 | 6,897 | 12 | 45,904 | 1 | −5 |
| Kitchenware/81 | 29,355 | 1 | 14,538 | 1 | 599 | 1 | 44,493 | 1 | −6 |
| Linens & Domestics/78 | 42,403 | 2 | 23,560 | 2 | 502 | 1 | 66,465 | 2 | −1 |
| Luggage/88 | 19,814 | 1 | 8,604 | 1 | 186 | 0 | 28,604 | 1 | 1 |
| Men's Furnishings/71 | 98,303 | 4 | 45,281 | 3 | 108 | 0 | 143,693 | 4 | −1 |
| Men's Outerwear/70 | 52,783 | 2 | 29,728 | 2 | 101 | 0 | 82,611 | 2 | 0 |
| Military Wear/40 | 48,460 | 2 | 12,726 | 1 | 0 | 0 | 61,186 | 2 | 3 |
| Miscellaneous/99 | 0 | 0 | −18 | 0 | 0 | 0 | −18 | 0 | – |
| Outdoor Living/89 | 54,418 | 2 | 6,936 | 0 | 54 | 0 | 61,408 | 2 | −8 |
| Photo Finishing/92 | 15,914 | 1 | 2,902 | 0 | 0 | 0 | 18,816 | 0 | −2 |
| Photography & Optical/93 | 55,513 | 2 | 49,042 | 3 | 3,856 | 7 | 108,410 | 3 | −2 |
| Precious & Semi-Precious Jewelery/56 | 28,699 | 1 | 22,474 | 2 | −2 | 0 | 51,171 | 1 | 19 |
| Recorded Sound & Video/98 | 27,270 | 1 | 33,998 | 2 | 420 | 1 | 61,688 | 2 | −4 |
| Sporting Goods & Camping Supplies/91 | 37,627 | 2 | 14,947 | 1 | 1,139 | 2 | 53,713 | 1 | −6 |
| Stationery/60 | 118,388 | 5 | 46,236 | 3 | 877 | 2 | 165,501 | 4 | 0 |
| Tobacco Products/10 | 100,057 | 4 | 30,802 | 2 | 28 | 0 | 130,886 | 3 | −4 |
| Toys, Games & Bicycles/95 | 46,099 | 2 | 33,583 | 2 | 1,022 | 2 | 80,704 | 2 | 3 |
| Traffic & Major Appliances/85 | 67,931 | 3 | 42,093 | 3 | 1,271 | 2 | 111,294 | 3 | −4 |
| Watches/51 | 24,161 | 1 | 12,758 | 1 | 44 | 0 | 36,962 | 1 | 3 |
| Women's Furnishings/73 | 58,279 | 2 | 18,507 | 1 | 491 | 1 | 77,276 | 2 | −3 |
| Women's Outerwear/72 | 74,580 | 3 | 41,146 | 3 | 313 | 1 | 116,039 | 3 | 3 |
| Yardage & Sewing Notions/79 | 15,914 | 1 | 10,944 | 1 | 531 | 1 | 27,389 | 1 | −12 |
| **Total** | **$2,423,677** | **1%** | **$1,440,301** | **1%** | **$58,050** | **1%** | **$3,922,028** | **1%** | **12%** |

# AAFES Exchange Sales—FY85

## Summary of Sales by Service Department

| Department | Alamo Region | Capitol Region | Golden Gate Region | Ohio Valley Region | Southeast Region | European Region | Pacific Region | Worldwide |
|---|---|---|---|---|---|---|---|---|
| Barber Shops | 7,798,676 | 5,378,590 | 6,725,702 | 7,262,488 | 8,299,229 | 10,260,156 | 5,205,422 | 50,930,263 |
| Beauty Shops | 2,215,846 | 1,751,242 | 2,929,038 | 2,073,950 | 3,039,228 | 4,982,958 | 2,659,197 | 19,651,459 |
| Bicycle/Lawn Mower Repair | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 |
| Books/Periodicals | 293,369 | 165,279 | 0 | 397,916 | 1,459,963 | 0 | 0 | 2,316,527 |
| Car/Trailer Rental | 183,677 | 185,492 | 764,655 | 209,481 | 1,824,131 | 4,176,775 | 2,507,879 | 9,852,090 |
| Clothing Alterations | 2,521,390 | 873,537 | 2,013,038 | 1,763,898 | 2,230,409 | 2,732,888 | 1,036,355 | 13,171,515 |
| Commodity Concessions | 5,450,156 | 3,653,507 | 7,187,743 | 4,756,101 | 8,562,664 | 43,083,700 | 13,762,323 | 86,456,194 |
| Custom Picture Framing | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 |
| Equipment/Appliance Rental | 1,730,580 | 708,203 | 2,782,135 | 1,502,912 | 1,711,280 | 8,868,670 | 1,459,713 | 18,763,493 |
| Floral Service | 2,886,722 | 2,381,962 | 3,827,099 | 2,758,675 | 3,075,324 | 3,317,578 | 1,600,072 | 19,847,432 |
| Garage/Auto Repair | 2,717,193 | 3,087,018 | 4,232,721 | 2,322,161 | 3,586,968 | 9,754,400 | 5,530,186 | 31,230,647 |
| Handicraft/Paintings | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 |
| Laundry/Dry Cleaning | 6,494,102 | 4,575,667 | 5,022,624 | 4,169,844 | 4,502,320 | 1,088,632 | 4,518,598 | 30,371,787 |
| Made-to-Measure Uniform/Clothing | 74,850 | 840,804 | 0 | 240,903 | 28,794 | 0 | 0 | 1,185,351 |
| Mini-Golf | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 1 |
| Optical Dispensing | 4,180,626 | 3,640,214 | 5,759,405 | 3,696,445 | 4,567,406 | 2,596,039 | 1,674,909 | 26,115,044 |
| Pet Grooming | 0 | 1 | 0 | 0 | 1 | 0 | 0 | 0 |
| Photo Processing | 107,287 | 0 | 0 | 0 | 12,341 | 0 | 893,804 | 1,013,432 |
| Pick-Up-Points | 10,958 | 17,862 | 0 | 0 | 0 | 25,089,829 | 0 | 25,118,649 |
| Pictorial Review/Yearbook | 3 | 3 | 3 | 3 | 3 | 0 | 0 | 3 |
| Portrait Studio | 2,305,887 | 803,492 | 295,109 | 1,417,089 | 2,315,569 | 738,241 | 383,337 | 8,258,724 |
| Quarters Cleaning/Lawn Care | 0 | 0 | 24,569 | 266,485 | 140,173 | 91,906 | 151,033 | 674,166 |
| Radio/TV/Appliance Repair | 417,934 | 149,026 | 707,705 | 303,624 | 408,497 | 444,443 | 1,683,848 | 4,115,077 |
| Recreation Services | 0 | 90,252 | 0 | 229,216 | 140,946 | 0 | 454,436 | 914,850 |
| Shoe Repair | 440,510 | 332,126 | 194,728 | 348,430 | 451,253 | 30,272 | 226,009 | 2,023,328 |
| Specialty Services | 425,990 | 265,174 | 53,245 | 971,371 | 1,207,824 | 329,900 | 801,570 | 4,055,074 |
| TV Rental | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 |
| Watch/Jewelry Repair | 727,078 | 585,472 | 862,009 | 478,091 | 1,002,788 | 90,220 | 518,526 | 4,264,184 |
| **Service Department Totals** | **$40,982,852** | **$29,484,940** | **$43,381,545** | **$35,169,100** | **$48,567,128** | **$117,676,624** | **$45,067,234** | **$360,329,423** |

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## AAFES Exchange Coupon Redemptions—FY85

| CONUS Region | Number | % of CONUS | % of Worldwide | $ Value | % of CONUS | % of Worldwide |
|---|---|---|---|---|---|---|
| Alamo | 511,470 | 12 | 11 | 281,868 | 12 | 11 |
| Southeast | 1,056,445 | 26 | 23 | 417,758 | 18 | 17 |
| Capitol | 1,026,829 | 25 | 22 | 650,388 | 29 | 26 |
| Golden Gate | 496,206 | 12 | 11 | 272,196 | 12 | 11 |
| Ohio Valley | 1,037,364 | 25 | 23 | 643,705 | 28 | 26 |
| **CONUS Totals** | **4,128,314** | **100%** | **90%** | **$2,265,915** | **100%** | **91%** |
| **Overseas Region** | **Number** | **% of Overseas** | **% of Worldwide** | **$ Value** | **% of Overseas** | **% of Worldwide** |
| Europe | 196,644 | 41 | 4 | 80,243 | 36 | 3 |
| Pacific | 283,721 | 59 | 6 | 143,775 | 64 | 6 |
| **Overseas Totals** | **480,365** | **100%** | **10%** | **$224,018** | **100%** | **9%** |
| **Worldwide Totals** | **4,608,679** | | | **$2,489,933** | | |

## Sales Summary ($ in Thousands)

| Category | Domestic | Overseas | Mail Order | Worldwide |
|---|---|---|---|---|
| Retail | 2,423,677 | 1,440,301 | 58,050 | 3,922,028 |
| Food | 175,872 | 188,141 | 0 | 364,013 |
| Services | 12,813 | 41,356 | 0 | 54,169 |
| Vending | 76,601 | 68,008 | 0 | 144,609 |
| Concessions | 259,985 | 173,196 | 0 | 433,181 |
| **Total** | **$2,948,948** | **$1,911,002** | **$58,050** | **$4,918,000** |

## Domestic Sales by Exchange Region

| Exchange Region | Retail Net Sales | Food Net Sales | Services Net Sales | Vending Net Sales | Concession Sales | Total |
|---|---|---|---|---|---|---|
| Alamo | 465,089 | 36,209 | 2,266 | 10,431 | 59,109 | 573,104 |
| Capitol | 446,290 | 22,438 | 2,398 | 9,954 | 41,364 | 522,444 |
| Golden Gate | 504,131 | 41,182 | 2,747 | 14,947 | 51,433 | 614,440 |
| Ohio Valley | 418,859 | 35,551 | 2,136 | 18,313 | 44,476 | 519,335 |
| Southeast | 587,856 | 40,459 | 3,265 | 22,956 | 63,603 | 718,139 |
| HQ Activities | 1,451 | 34 | 0 | 0 | 0 | 1,485 |
| **Total** | **$2,423,676** | **$175,873** | **$12,812** | **$76,601** | **$259,985** | **$2,948,947** |

# AAFES Exchange Sales—FY85

## Alamo Exchange Region Sales by Retail Department ($ in Thousands)

| Department/Dept. Code | FY 85 Department Sales | % of All-Dept. Region Total | % of Domestic Dept. Total | % of Worldwide Dept. Total | FY 84 Department Sales | Dept. Sales % Change 85/84 |
|---|---|---|---|---|---|---|
| Automotive Labor/03 | 1,588 | 0 | 16 | 14 | – | – |
| Automotive/01 | 13,021 | 3 | 18 | 13 | 10,873 | 20 |
| Beer & Sodas/23 | 23,618 | 5 | 20 | 12 | 21,827 | 8 |
| Boyswear/74 | 4,858 | 1 | 18 | 12 | 4,997 | −3 |
| Cleaning Supplies/83 | 7,133 | 2 | 21 | 14 | 6,645 | 7 |
| Cosmetics & Fragrances/34 | 14,125 | 3 | 22 | 16 | 12,852 | 10 |
| DPSC Merchandise/19 | 18,799 | 4 | 18 | 13 | 20,895 | −10 |
| Dinnerware & Flatware/80 | 2,128 | 0 | 20 | 11 | 2,418 | −12 |
| Food & Juices/20 | 26,600 | 6 | 19 | 11 | 25,451 | 5 |
| Footwear/77 | 17,901 | 4 | 21 | 14 | 16,689 | 7 |
| Furniture & Rugs/86 | 2,763 | 1 | 14 | 6 | 3,222 | −14 |
| Gasoline/02 | 52,540 | 11 | 18 | 13 | – | – |
| Giftware/82 | 3,694 | 1 | 16 | 8 | 3,905 | −5 |
| Girlswear/75 | 3,859 | 1 | 19 | 12 | 4,068 | −5 |
| Hardware/87 | 9,976 | 2 | 19 | 15 | 9,595 | 4 |
| Health & Beauty Aids/30 | 24,975 | 5 | 19 | 13 | 25,361 | −2 |
| Home Entertainment/97 | 22,962 | 5 | 17 | 5 | 21,879 | 5 |
| Infants' & Toddlers' Wear/76 | 5,686 | 1 | 18 | 11 | 5,707 | 0 |
| Jewelery/50 | 4,830 | 1 | 18 | 11 | 5,152 | −6 |
| Kitchenware/81 | 5,393 | 1 | 18 | 12 | 6,189 | −13 |
| Linens & Domestics/78 | 7,821 | 2 | 18 | 12 | 7,777 | 1 |
| Luggage/88 | 4,866 | 1 | 25 | 17 | 4,505 | 8 |
| Men's Furnishings/71 | 19,548 | 4 | 20 | 14 | 18,943 | 3 |
| Men's Outerwear/70 | 10,648 | 2 | 20 | 13 | 10,425 | 2 |
| Military Wear/40 | 10,750 | 2 | 22 | 18 | 10,119 | 6 |
| Miscellaneous/99 | – | – | – | – | – | – |
| Outdoor Living/89 | 12,883 | 3 | 24 | 21 | 14,143 | −9 |
| Photo Finishing/92 | 3,017 | 1 | 19 | 16 | 3,141 | −4 |
| Photography & Optical/93 | 11,076 | 2 | 20 | 10 | 11,255 | −2 |
| Precious & Semi-Precious Jewelery/56 | 6,030 | 1 | 21 | 12 | 5,592 | 8 |
| Recorded Sound & Video/98 | 5,721 | 1 | 21 | 9 | 5,411 | 6 |
| Sporting Goods & Camping Supplies/91 | 6,797 | 1 | 18 | 13 | 6,985 | −3 |
| Stationery/60 | 23,824 | 5 | 20 | 14 | 22,807 | 4 |
| Tobacco Products/10 | 18,637 | 4 | 19 | 14 | 18,576 | 0 |
| Toys, Games & Bicycles/95 | 8,589 | 2 | 19 | 11 | 7,081 | 21 |
| Traffic & Major Appliances/85 | 12,426 | 3 | 18 | 11 | 12,831 | −3 |
| Watches/51 | 5,106 | 1 | 21 | 14 | 4,909 | 4 |
| Women's Furnishings/73 | 11,389 | 2 | 20 | 15 | 11,545 | −1 |
| Women's Outerwear/72 | 16,119 | 3 | 22 | 14 | 14,984 | 8 |
| Yardage & Sewing Notions/79 | 3,393 | 1 | 21 | 12 | 3,627 | −6 |
| **Total** | **$465,089** | **100%** | **19%** | **12%** | **$402,381** | **16%** |

# AAFES Exchange Sales—FY85

## Capitol Exchange Region Sales by Retail Department ($ in Thousands)

| Department/Dept. Code | FY 85 Department Sales | % of All-Dept. Region Total | % of Domestic Dept. Total | % of Worldwide Dept. Total | FY 84 Department Sales | Dept. Sales % Change 85/84 |
|---|---|---|---|---|---|---|
| Automotive Labor/03 | 1,976 | 0 | 20 | 17 | – | – |
| Automotive/01 | 13,549 | 3 | 19 | 13 | 11,470 | 18 |
| Beer & Sodas/23 | 17,462 | 4 | 15 | 9 | 16,741 | 4 |
| Boyswear/74 | 5,436 | 1 | 21 | 13 | 5,727 | −5 |
| Cleaning Supplies/83 | 5,646 | 1 | 17 | 11 | 5,406 | 4 |
| Cosmetics & Fragrances/34 | 12,808 | 3 | 20 | 15 | 11,471 | 12 |
| DPSC Merchandise/19 | 21,029 | 5 | 20 | 15 | 23,760 | −11 |
| Dinnerware & Flatware/80 | 2,167 | 0 | 21 | 11 | 2,070 | 5 |
| Food & Juices/20 | 23,504 | 5 | 16 | 10 | 23,745 | −1 |
| Footwear/77 | 15,201 | 3 | 18 | 12 | 14,280 | 6 |
| Furniture & Rugs/86 | 2,674 | 1 | 14 | 6 | 2,677 | 0 |
| Gasoline/02 | 53,493 | 12 | 18 | 13 | – | – |
| Giftware/82 | 6,003 | 1 | 26 | 13 | 6,653 | −10 |
| Girlswear/75 | 3,927 | 1 | 20 | 12 | 3,610 | 9 |
| Hardware/87 | 10,677 | 2 | 20 | 16 | 10,681 | 0 |
| Health & Beauty Aids/30 | 25,494 | 6 | 19 | 13 | 25,612 | 0 |
| Home Entertainment/97 | 23,299 | 5 | 18 | 5 | 21,936 | 6 |
| Infants' & Toddlers' Wear/76 | 5,718 | 1 | 18 | 11 | 5,403 | 6 |
| Jewelery/50 | 4,903 | 1 | 19 | 11 | 4,910 | 0 |
| Kitchenware/81 | 5,212 | 1 | 18 | 12 | 5,692 | −8 |
| Linens & Domestics/78 | 8,475 | 2 | 20 | 13 | 7,876 | 8 |
| Luggage/88 | 3,290 | 1 | 17 | 12 | 3,284 | 0 |
| Men's Furnishings/71 | 20,034 | 4 | 20 | 14 | 19,297 | 4 |
| Men's Outerwear/70 | 10,722 | 2 | 20 | 13 | 9,742 | 10 |
| Military Wear/40 | 9,576 | 2 | 20 | 16 | 9,361 | 2 |
| Miscellaneous/99 | – | – | – | – | – | – |
| Outdoor Living/89 | 9,907 | 2 | 18 | 16 | 9,532 | 4 |
| Photo Finishing/92 | 2,478 | 1 | 16 | 13 | 2,561 | −3 |
| Photography & Optical/93 | 10,737 | 2 | 19 | 10 | 10,667 | 1 |
| Precious & Semi-Precious Jewelery/56 | 5,102 | 1 | 18 | 10 | 4,341 | 18 |
| Recorded Sound & Video/98 | 3,715 | 1 | 14 | 6 | 3,548 | 5 |
| Sporting Goods & Camping Supplies/91 | 4,585 | 1 | 12 | 9 | 5,151 | −11 |
| Stationery/60 | 21,084 | 5 | 18 | 13 | 21,520 | −2 |
| Tobacco Products/10 | 22,292 | 5 | 22 | 17 | 24,466 | −9 |
| Toys, Games & Bicycles/95 | 7,237 | 2 | 16 | 9 | 6,770 | 7 |
| Traffic & Major Appliances/85 | 11,524 | 3 | 17 | 10 | 11,981 | −4 |
| Watches/51 | 4,442 | 1 | 18 | 12 | 4,284 | 4 |
| Women's Furnishings/73 | 12,753 | 3 | 22 | 17 | 12,326 | 3 |
| Women's Outerwear/72 | 15,395 | 3 | 21 | 13 | 14,438 | 7 |
| Yardage & Sewing Notions/79 | 2,764 | 1 | 17 | 10 | 3,104 | −11 |
| **Total** | **$446,290** | **100%** | **18%** | **11%** | **$386,093** | **16%** |

# AAFES Exchange Sales—FY85

## Golden Gate Exchange Region Sales by Retail Department ($ in Thousands)

| Department/Dept. Code | FY 85 Department Sales | % of All-Dept. Region Total | % of Domestic Dept. Total | % of Worldwide Dept. Total | FY 84 Department Sales | Dept. Sales % Change 85/84 |
|---|---|---|---|---|---|---|
| Automotive Labor/03 | 3,052 | 1 | 30 | 26 | – | – |
| Automotive/01 | 15,071 | 3 | 21 | 14 | 15,059 | 0 |
| Beer & Sodas/23 | 21,259 | 4 | 18 | 11 | 20,286 | 5 |
| Boyswear/74 | 5,549 | 1 | 21 | 13 | 5,847 | −5 |
| Cleaning Supplies/83 | 5,730 | 1 | 17 | 11 | 5,719 | 0 |
| Cosmetics & Fragrances/34 | 13,273 | 3 | 20 | 15 | 11,698 | 13 |
| DPSC Merchandise/19 | 17,553 | 3 | 16 | 12 | 19,466 | −10 |
| Dinnerware & Flatware/80 | 2,198 | 0 | 21 | 11 | 2,690 | −18 |
| Food & Juices/20 | 30,790 | 6 | 22 | 13 | 32,363 | −5 |
| Footwear/77 | 15,084 | 3 | 18 | 12 | 13,917 | 8 |
| Furniture & Rugs/86 | 4,923 | 1 | 26 | 10 | 5,653 | −13 |
| Gasoline/02 | 81,364 | 16 | 27 | 20 | – | – |
| Giftware/82 | 5,539 | 1 | 24 | 12 | 6,361 | −13 |
| Girlswear/75 | 4,352 | 1 | 22 | 13 | 4,351 | 0 |
| Hardware/87 | 10,266 | 2 | 19 | 15 | 10,303 | 0 |
| Health & Beauty Aids/30 | 24,953 | 5 | 19 | 13 | 25,676 | −3 |
| Home Entertainment/97 | 28,973 | 6 | 22 | 6 | 28,349 | 2 |
| Infants' & Toddlers' Wear/76 | 7,124 | 1 | 23 | 14 | 6,782 | 5 |
| Jewelery/50 | 4,666 | 1 | 18 | 10 | 5,547 | −16 |
| Kitchenware/81 | 6,988 | 1 | 24 | 16 | 7,435 | −6 |
| Linens & Domestics/78 | 8,740 | 2 | 21 | 13 | 9,672 | −10 |
| Luggage/88 | 3,078 | 1 | 16 | 11 | 3,140 | −2 |
| Men's Furnishings/71 | 17,240 | 3 | 18 | 12 | 18,120 | −5 |
| Men's Outerwear/70 | 11,126 | 2 | 21 | 13 | 10,950 | 2 |
| Military Wear/40 | 7,731 | 2 | 16 | 13 | 8,852 | −13 |
| Miscellaneous/99 | – | – | – | – | – | – |
| Outdoor Living/89 | 10,508 | 2 | 19 | 17 | 11,186 | −6 |
| Photo Finishing/92 | 3,999 | 1 | 25 | 21 | 4,058 | −1 |
| Photography & Optical/93 | 12,304 | 2 | 22 | 11 | 12,928 | −5 |
| Precious & Semi-Precious Jewelery/56 | 6,662 | 1 | 23 | 13 | 5,729 | 16 |
| Recorded Sound & Video/98 | 5,879 | 1 | 22 | 10 | 6,009 | −2 |
| Sporting Goods & Camping Supplies/91 | 9,912 | 2 | 26 | 18 | 11,406 | −13 |
| Stationery/60 | 23,983 | 5 | 20 | 14 | 24,300 | −1 |
| Tobacco Products/10 | 15,886 | 3 | 16 | 12 | 16,586 | −4 |
| Toys, Games & Bicycles/95 | 11,012 | 2 | 24 | 14 | 10,820 | 2 |
| Traffic & Major Appliances/85 | 12,677 | 3 | 19 | 11 | 14,389 | −12 |
| Watches/51 | 4,262 | 1 | 18 | 12 | 4,540 | −6 |
| Women's Furnishings/73 | 11,609 | 2 | 20 | 15 | 12,315 | −6 |
| Women's Outerwear/72 | 15,878 | 3 | 21 | 14 | 15,481 | 3 |
| Yardage & Sewing Notions/79 | 2,938 | 1 | 18 | 11 | 3,859 | −24 |
| **Total** | **$504,131** | **100%** | **21%** | **13%** | **$431,842** | **17%** |

*Includes sales from AAFES exchanges in Alaska.

# AAFES Exchange Sales—FY85

## Ohio Valley Exchange Region Sales by Retail Department ($ in Thousands)

| Department/Dept. Code | FY 85 Department Sales | % of All-Dept. Region Total | % of Domestic Dept. Total | % of Worldwide Dept. Total | FY 84 Department Sales | Dept. Sales % Change 85/84 |
|---|---|---|---|---|---|---|
| Automotive Labor/03 | 1,753 | 0 | 17 | 15 | – | – |
| Automotive/01 | 13,375 | 3 | 19 | 13 | 11,684 | 14 |
| Beer & Sodas/23 | 18,127 | 4 | 15 | 9 | 16,275 | 11 |
| Boyswear/74 | 4,297 | 1 | 16 | 10 | 4,653 | −8 |
| Cleaning Supplies/83 | 6,173 | 1 | 18 | 12 | 6,042 | 2 |
| Cosmetics & Fragrances/34 | 9,428 | 2 | 14 | 11 | 8,463 | 10 |
| DPSC Merchandise/19 | 23,915 | 6 | 22 | 17 | 27,578 | −13 |
| Dinnerware & Flatware/80 | 1,407 | 0 | 14 | 7 | 1,694 | −17 |
| Food & Juices/20 | 28,482 | 7 | 20 | 12 | 28,033 | 2 |
| Footwear/77 | 15,357 | 4 | 18 | 12 | 15,193 | 1 |
| Furniture & Rugs/86 | 2,126 | 1 | 11 | 4 | 2,617 | −19 |
| Gasoline/02 | 49,031 | 12 | 16 | 12 | – | – |
| Giftware/82 | 3,260 | 1 | 14 | 7 | 3,597 | −9 |
| Girlswear/75 | 3,332 | 1 | 17 | 10 | 3,320 | 0 |
| Hardware/87 | 8,800 | 2 | 17 | 13 | 8,606 | 2 |
| Health & Beauty Aids/30 | 21,704 | 5 | 16 | 11 | 21,750 | 0 |
| Home Entertainment/97 | 22,888 | 5 | 17 | 5 | 20,253 | 13 |
| Infants' & Toddlers' Wear/76 | 4,907 | 1 | 16 | 10 | 4,929 | 0 |
| Jewelery/50 | 4,988 | 1 | 19 | 11 | 4,540 | 10 |
| Kitchenware/81 | 4,591 | 1 | 16 | 10 | 4,907 | −6 |
| Linens & Domestics/78 | 6,801 | 2 | 16 | 10 | 6,600 | 3 |
| Luggage/88 | 3,601 | 1 | 18 | 13 | 3,472 | 4 |
| Men's Furnishings | 16,235 | 4 | 17 | 11 | 15,775 | 3 |
| Men's Outerwear/70 | 9,283 | 2 | 18 | 11 | 9,104 | 2 |
| Military Wear/40 | 10,758 | 3 | 22 | 18 | 10,298 | 4 |
| Miscellaneous/99 | – | – | – | – | – | – |
| Outdoor Living/89 | 7,737 | 2 | 14 | 13 | 8,067 | −4 |
| Photo Finishing/92 | 2,819 | 1 | 18 | 15 | 2,777 | 2 |
| Photography & Optical/93 | 9,293 | 2 | 17 | 9 | 9,442 | −2 |
| Precious & Semi-Precious Jewelery/56 | 4,360 | 1 | 15 | 9 | 3,723 | 17 |
| Recorded Sound & Video/98 | 5,522 | 1 | 20 | 9 | 5,032 | 10 |
| Sporting Goods & Camping Supplies/91 | 5,559 | 1 | 15 | 10 | 5,293 | 5 |
| Stationery/60 | 22,465 | 5 | 19 | 14 | 22,449 | 0 |
| Tobacco Products/10 | 22,673 | 5 | 23 | 17 | 23,152 | −2 |
| Toys, Games & Bicycles/95 | 7,485 | 2 | 16 | 9 | 7,367 | 2 |
| Traffic & Major Appliances/85 | 10,182 | 2 | 15 | 9 | 10,653 | −4 |
| Watches/51 | 4,093 | 1 | 17 | 11 | 4,143 | −1 |
| Women's Furnishings/73 | 8,472 | 2 | 15 | 11 | 8,694 | −3 |
| Women's Outerwear/72 | 11,143 | 3 | 15 | 10 | 11,108 | 0 |
| Yardage & Sewing Notions/79 | 2,437 | 1 | 15 | 9 | 2,975 | −18 |
| **Total** | **$418,859** | **100%** | **17%** | **11%** | **$364,258** | **15%** |

# AAFES Exchange Sales—FY85

## Southeast Exchange Region Sales by Retail Department ($ in Thousands)

| Department/Dept. Code | FY 85 Department Sales | % of All-Dept. Region Total | % of Domestic Dept. Total | % of Worldwide Dept. Total | FY 84 Department Sales | Dept. Sales % Change 85/84 |
|---|---|---|---|---|---|---|
| Automotive Labor/03 | 1,686 | 0 | 17 | 14 | – | – |
| Automotive/01 | 15,857 | 3 | 22 | 15 | 15,794 | 0 |
| Beer & Sodas/23 | 39,669 | 7 | 33 | 21 | 36,128 | 10 |
| Boyswear/74 | 6,366 | 1 | 24 | 15 | 6,880 | –7 |
| Cleaning Supplies/83 | 9,096 | 2 | 27 | 18 | 8,995 | 1 |
| Cosmetics & Fragrances/34 | 15,481 | 3 | 24 | 18 | 15,463 | 0 |
| DPSC Merchandise/19 | 24,490 | 4 | 23 | 17 | 27,642 | –11 |
| Dinnerware & Flatware/80 | 2,496 | 0 | 24 | 12 | 2,682 | –7 |
| Food & Juices/20 | 33,785 | 6 | 24 | 14 | 36,402 | –7 |
| Footwear/77 | 22,113 | 4 | 26 | 18 | 22,525 | –2 |
| Furniture & Rugs/86 | 6,667 | 1 | 35 | 14 | 7,645 | –13 |
| Gasoline/02 | 61,349 | 10 | 21 | 15 | – | – |
| Giftware/82 | 4,621 | 1 | 20 | 10 | 4,936 | –6 |
| Girlswear/75 | 4,659 | 1 | 23 | 14 | 4,792 | –3 |
| Hardware/87 | 13,289 | 2 | 25 | 10 | 13,681 | –3 |
| Health & Beauty Aids/30 | 34,642 | 6 | 26 | 17 | 34,401 | 1 |
| Home Entertainment/97 | 34,270 | 6 | 26 | 7 | 30,700 | 12 |
| Infants' & Toddlers' Wear/76 | 7,639 | 1 | 25 | 15 | 8,084 | –6 |
| Jewelery/50 | 6,993 | 1 | 27 | 15 | 7,218 | –3 |
| Kitchenware/81 | 7,171 | 1 | 24 | 16 | 8,155 | –12 |
| Linens & Domestics/78 | 10,565 | 2 | 25 | 16 | 10,651 | –1 |
| Luggage/88 | 4,980 | 1 | 25 | 17 | 5,269 | –5 |
| Men's Furnishings/71 | 25,245 | 4 | 26 | 18 | 25,902 | –3 |
| Men's Outerwear/70 | 11,004 | 2 | 21 | 13 | 11,630 | –5 |
| Military Wear/40 | 9,645 | 2 | 20 | 16 | 9,209 | 5 |
| Miscellaneous/99 | – | – | – | – | – | – |
| Outdoor Living/89 | 13,383 | 2 | 25 | 22 | 14,699 | –9 |
| Photo Finishing/92 | 3,602 | 1 | 23 | 19 | 3,714 | –3 |
| Photography & Optical/93 | 12,103 | 2 | 22 | 11 | 12,596 | –4 |
| Precious & Semi-Precious Jewelery/56 | 6,545 | 1 | 23 | 13 | 5,112 | 28 |
| Recorded Sound & Video/98 | 6,433 | 1 | 24 | 10 | 6,733 | –4 |
| Sporting Goods & Camping Supplies/91 | 10,774 | 2 | 29 | 20 | 11,429 | –6 |
| Stationery/60 | 27,032 | 5 | 23 | 16 | 28,332 | –5 |
| Tobacco Products/10 | 20,568 | 3 | 21 | 16 | 22,232 | –7 |
| Toys, Games & Bicycles/95 | 11,775 | 2 | 26 | 15 | 11,635 | 1 |
| Traffic & Major Appliances/85 | 21,122 | 4 | 31 | 19 | 22,218 | –5 |
| Watches/51 | 6,257 | 1 | 26 | 17 | 6,187 | 1 |
| Women's Furnishings/73 | 14,056 | 2 | 24 | 18 | 15,222 | –8 |
| Women's Outerwear/72 | 16,046 | 3 | 22 | 14 | 16,580 | –3 |
| Yardage & Sewing Notions/79 | 4,382 | 1 | 28 | 16 | 4,961 | –12 |
| **Total** | **$587,856** | **100%** | **24%** | **15%** | **$536,434** | **10%** |

# AAFES Exchange Sales—FY85

## AAFES-Europe Sales by Retail Department ($ in Thousands)

| Department/Dept. Code | FY 85 Department Sales | % of All-Dept. Region Total | % of Domestic Dept. Total | % of Worldwide Dept. Total | FY 84 Department Sales | Dept. Sales % Change 85/84 |
|---|---|---|---|---|---|---|
| Automotive Labor/03 | 502 | 0 | 30 | 4 | – | – |
| Automotive/01 | 25,785 | 3 | 78 | 25 | 27,916 | −8 |
| Beer & Sodas/23 | 57,740 | 6 | 81 | 30 | 59,010 | −2 |
| Boyswear/74 | 12,103 | 1 | 82 | 29 | 12,157 | 0 |
| Cleaning Supplies/83 | 12,136 | 1 | 72 | 24 | 11,453 | 6 |
| Cosmetics & Fragrances/34 | 13,353 | 1 | 59 | 15 | 11,367 | 17 |
| DPSC Merchandise/19 | 25,761 | 3 | 77 | 18 | 29,922 | −14 |
| Dinnerware & Flatware/80 | 4,018 | 0 | 59 | 20 | 3,577 | 12 |
| Food & Juices/20 | 65,441 | 6 | 69 | 28 | 62,701 | 4 |
| Footwear/77 | 30,123 | 3 | 78 | 24 | 29,408 | 2 |
| Furniture & Rugs/86 | 17,266 | 2 | 63 | 36 | 17,121 | 1 |
| Gasoline/02 | 78,484 | 8 | 66 | 19 | – | – |
| Giftware/82 | 16,296 | 2 | 86 | 34 | 17,151 | −5 |
| Girlswear/75 | 10,567 | 1 | 80 | 32 | 10,330 | 2 |
| Hardware/87 | 9,517 | 1 | 69 | 14 | 9,007 | 6 |
| Health & Beauty Aids/30 | 44,862 | 4 | 68 | 23 | 44,321 | 1 |
| Home Entertainment/97 | 204,890 | 20 | 65 | 43 | 206,771 | −1 |
| Infants' & Toddlers' Wear/76 | 14,300 | 1 | 76 | 29 | 13,378 | 7 |
| Jewelery/50 | 9,331 | 1 | 74 | 20 | 11,014 | −15 |
| Kitchenware/81 | 10,811 | 1 | 74 | 24 | 10,850 | 0 |
| Linens & Domestics/78 | 17,091 | 2 | 73 | 26 | 16,876 | 1 |
| Luggage/88 | 6,932 | 1 | 81 | 24 | 6,794 | 2 |
| Men's Furnishings/71 | 35,793 | 4 | 79 | 25 | 37,040 | −3 |
| Men's Outerwear/70 | 25,888 | 3 | 87 | 31 | 27,199 | −5 |
| Military Wear/40 | 9,464 | 1 | 74 | 15 | 8,532 | 11 |
| Miscellaneous/99 | −18 | 0 | 100 | 100 | 0 | – |
| Outdoor Living/89 | 4,728 | 0 | 68 | 8 | 4,880 | −3 |
| Photo Finishing/92 | 79 | 0 | 3 | 0 | 202 | −61 |
| Photography & Optical/93 | 30,353 | 3 | 62 | 28 | 30,382 | 0 |
| Precious & Semi-Precious Jewelery/56 | 13,332 | 1 | 59 | 26 | 10,069 | 32 |
| Recorded Sound & Video/98 | 25,153 | 2 | 74 | 41 | 27,577 | −9 |
| Sporting Goods & Camping Supplies/91 | 8,250 | 1 | 55 | 15 | 7,925 | 4 |
| Stationery/60 | 29,206 | 2 | 63 | 18 | 28,855 | 1 |
| Tobacco Products/10 | 22,053 | 2 | 72 | 17 | 22,040 | 0 |
| Toys, Games & Bicycles/95 | 27,553 | 3 | 82 | 34 | 26,482 | 4 |
| Traffic & Major Appliances/85 | 25,863 | 3 | 61 | 23 | 25,831 | 0 |
| Watches/51 | 9,413 | 1 | 74 | 25 | 8,159 | 15 |
| Women's Furnishings/73 | 14,138 | 1 | 76 | 18 | 14,989 | −6 |
| Women's Outerwear/72 | 32,395 | 3 | 79 | 28 | 31,100 | 4 |
| Yardage & Sewing Notions/79 | 7,088 | 1 | 65 | 26 | 8,246 | −14 |
| **Total** | **$1,008,040** | **100%** | **70%** | **26%** | **$930,632** | **8%** |

# AAFES Exchange Sales—FY85

## AAFES—Pacific Sales by Retail Department ($ in Thousands)

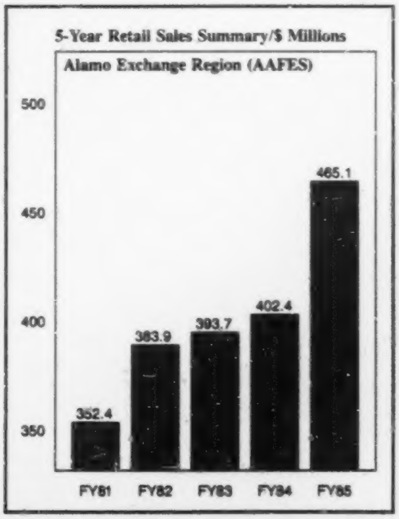
| Department/Dept. Code | FY 85 Department Sales | % of All-Dept. Region Total | % of Domestic Dept. Total | % of Worldwide Dept. Total | FY 84 Department Sales | Dept. Sales % Change 85/84 |
|---|---|---|---|---|---|---|
| Automotive Labor/03 | 1,158 | 0 | 70 | 10 | – | – |
| Automotive/01 | 7,222 | 2 | 22 | 7 | 6,770 | 7 |
| Beer & Sodas/23 | 13,396 | 3 | 19 | 7 | 13,333 | 0 |
| Boyswear/74 | 2,724 | 1 | 18 | 7 | 2,717 | 0 |
| Cleaning Supplies/83 | 4,815 | 1 | 28 | 9 | 4,437 | 9 |
| Cosmetics & Fragrances/34 | 9,191 | 2 | 41 | 10 | 7,542 | 22 |
| DPSC Merchandise/19 | 7,883 | 2 | 23 | 6 | 10,052 | −22 |
| Dinnerware & Flatware/80 | 2,764 | 1 | 41 | 14 | 2,643 | 5 |
| Food & Juices/20 | 28,980 | 7 | 31 | 12 | 29,330 | −1 |
| Footwear/77 | 8,356 | 2 | 22 | 7 | 7,326 | 14 |
| Furniture & Rugs/86 | 10,001 | 2 | 37 | 21 | 10,635 | −6 |
| Gasoline/02 | 40,258 | 9 | 34 | 10 | – | – |
| Giftware/82 | 2,740 | 1 | 14 | 6 | 2,858 | −4 |
| Girlswear/75 | 2,598 | 1 | 20 | 8 | 2,324 | 12 |
| Hardware/87 | 4,240 | 1 | 31 | 6 | 4,252 | 0 |
| Health & Beauty Aids/30 | 21,438 | 5 | 32 | 11 | 22,964 | −7 |
| Home Entertainment/97 | 111,361 | 26 | 35 | 23 | 115,586 | −4 |
| Infants' & Toddlers' Wear/76 | 4,617 | 1 | 24 | 9 | 4,156 | 11 |
| Jewelery/50 | 3,296 | 1 | 26 | 7 | 2,834 | 16 |
| Kitchenware/81 | 3,727 | 1 | 26 | 8 | 3,694 | 1 |
| Linens & Domestics/78 | 6,470 | 1 | 27 | 10 | 6,804 | −5 |
| Luggage/88 | 1,672 | 0 | 19 | 6 | 1,606 | 4 |
| Men's Furnishings/71 | 9,488 | 2 | 21 | 7 | 9,567 | −1 |
| Men's Outerwear/70 | 3,839 | 1 | 13 | 5 | 3,796 | 1 |
| Military Wear/40 | 3,262 | 1 | 26 | 5 | 3,319 | −2 |
| Miscellaneous/99 | – | – | – | – | – | – |
| Outdoor Living/89 | 2,208 | 1 | 32 | 4 | 3,822 | −42 |
| Photo Finishing/92 | 2,823 | 1 | 97 | 15 | 2,791 | 1 |
| Photography & Optical/93 | 18,688 | 4 | 38 | 17 | 19,610 | −5 |
| Precious & Semi-Precious Jewelery/56 | 9,142 | 2 | 41 | 18 | 8,412 | 9 |
| Recorded Sound & Video/98 | 8,845 | 2 | 26 | 14 | 9,641 | −8 |
| Sporting Goods & Camping Supplies/91 | 6,697 | 2 | 45 | 12 | 7,542 | −11 |
| Stationery/60 | 17,030 | 4 | 37 | 10 | 16,877 | 1 |
| Tobacco Products/10 | 8,748 | 2 | 28 | 7 | 9,174 | −5 |
| Toys, Games & Bicycles/95 | 6,030 | 1 | 18 | 7 | 7,428 | −19 |
| Traffic & Major Appliances/85 | 16,230 | 4 | 39 | 15 | 16,944 | −4 |
| Watches/51 | 3,344 | 1 | 26 | 9 | 3,590 | −7 |
| Women's Furnishings/73 | 4,369 | 1 | 24 | 6 | 4,291 | 2 |
| Women's Outerwear/72 | 8,751 | 2 | 21 | 8 | 8,332 | 5 |
| Yardage & Sewing Notions/79 | 3,856 | 1 | 35 | 14 | 3,833 | 1 |
| **Total** | **$432,257** | **100%** | **30%** | **11%** | **$400,832** | **8%** |

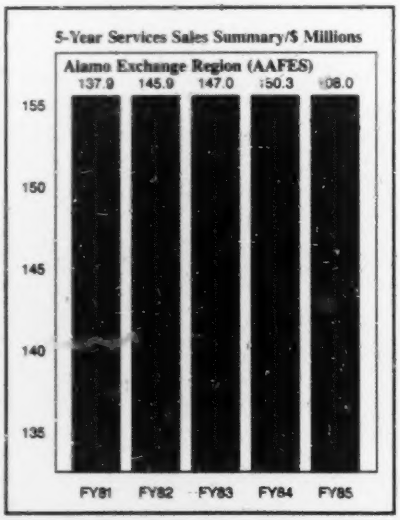
# AAFES Exchange Sales—FY85 (Continental U.S.)

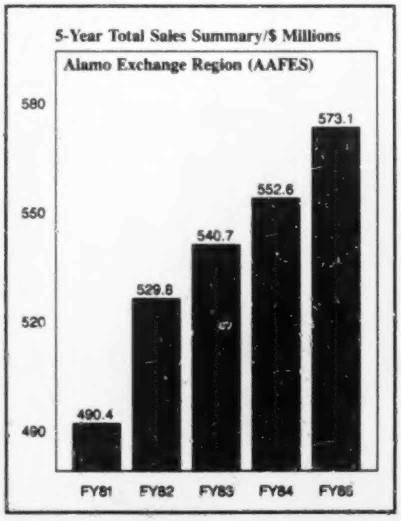
## Alamo Region (ALER)

| Store | FY 85 $ Sales Retail | FY 85 $ Sales Services & Other | FY 85 $ Sales Total | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| Altus AFB, OK | 5,544,000 | 944,000 | 6,488,000 | 6,129,000 | 6 |
| Barksdale AFB, LA | 20,713,000 | 2,833,000 | 23,546,000 | 22,793,000 | 3 |
| Bergstrom AFB, TX | 17,063,000 | 2,282,000 | 19,345,000 | 18,823,000 | 3 |
| Blytheville AFB, AR | 6,240,000 | 691,000 | 6,931,000 | 6,683,000 | 4 |
| Brooks AFB, TX | 2,441,000 | 378,000 | 2,819,000 | 2,844,000 | −1 |
| Cannon AFB, NM | 6,741,000 | 1,529,000 | 8,270,000 | 8,236,000 | 0 |
| Carswell AFB, TX | 28,903,000 | 3,474,000 | 32,377,000 | 30,706,000 | 5 |
| Dyess AFB, TX | 9,165,000 | 1,791,000 | 10,956,000 | 10,763,000 | 2 |
| England AFB, LA | 6,479,000 | 1,032,000 | 7,511,000 | 7,871,000 | −5 |
| Fort Bliss, TX | 37,538,000 | 9,179,000 | 46,717,000 | 47,718,000 | −2 |
| Fort Chaffee, AR | 2,331,000 | 188,000 | 2,519,000 | 2,566,000 | −2 |
| Fort Hood, TX | 58,005,000 | 17,355,000 | 75,360,000 | 74,351,000 | 1 |
| Fort Polk, LA | 25,521,000 | 9,279,000 | 34,800,000 | 33,829,000 | 3 |
| Fort Sam Houston, TX | 41,929,000 | 6,450,000 | 48,379,000 | 47,546,000 | 2 |
| Fort Sill, OK | 30,943,000 | 10,740,000 | 41,683,000 | 37,801,000 | 10 |
| Goodfellow AFB, TX | 4,474,000 | 910,000 | 5,384,000 | 5,326,000 | 1 |
| Holloman AFB, NM | 11,930,000 | 3,865,000 | 15,795,000 | 10,791,000 | 46 |
| Kirtland AFB, NM | 16,077,000 | 2,943,000 | 19,020,000 | 17,942,000 | 6 |
| Lackland AFB, TX | 48,930,000 | 16,198,000 | 65,128,000 | 60,490,000 | 8 |
| Laughlin AFB, TX | 3,765,000 | 849,000 | 4,614,000 | 4,512,000 | 2 |
| Little Rock AFB, AR | 15,323,000 | 2,583,000 | 17,906,000 | 17,615,000 | 2 |
| Randolph AFB, TX | 19,106,000 | 2,782,000 | 21,888,000 | 21,081,000 | 4 |
| Reese AFB, TX | 4,785,000 | 909,000 | 5,694,000 | 5,536,000 | 3 |
| Sheppard AFB, TX | 20,989,000 | 6,468,000 | 27,457,000 | 24,002,000 | 14 |
| Tinker AFB, OK | 17,931,000 | 1,895,000 | 19,826,000 | 19,444,000 | 2 |
| Vance AFB, OK | 2,224,000 | 471,000 | 2,695,000 | 2,984,000 | −10 |
| White Sands Missile Range, NM* | 0 | 0 | 0 | 4,281,000 | −100 |
| **ALER Totals** | **$465,090,000** | **$108,018,000** | **$573,108,000** | **$552,663,000** | **4%** |

*Consolidated with Holloman exchange 1/25/85





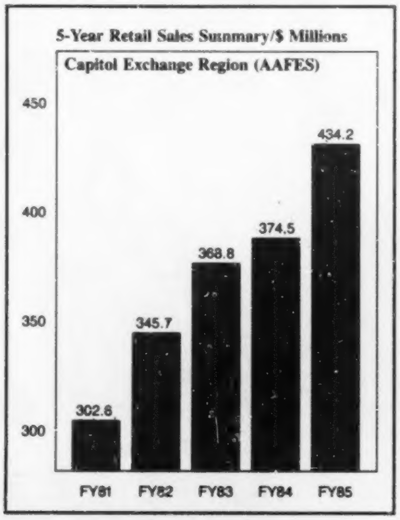


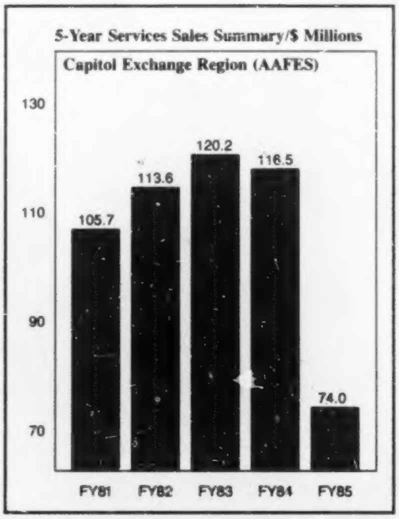
# AAFES Exchange Sales—FY85

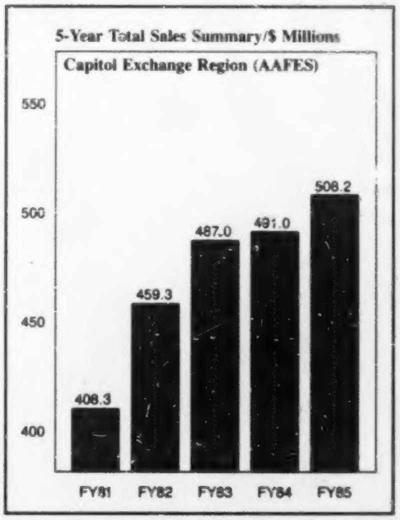
## Capitol Region (CPER)

| | FY 85 $ Sales | | | | |
|---|---|---|---|---|---|
| Store | Retail | Services & Other | Total | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
| Aberdeen Proving Grounds, MD | 12,396,000 | 3,158,000 | 15,554,000 | 16,184,000 | −4 |
| Andrews AFB, D.C. | 34,943,000 | 4,922,000 | 39,865,000 | 38,031,000 | 5 |
| Bolling AFB, D.C. | 19,219,000 | 2,374,000 | 21,593,000 | 20,862,000 | 4 |
| Cameron Station, VA | 25,302.000 | 1,784,000 | 27,086,000 | 25,583,000 | 6 |
| Carlisle Barracks, PA | 12,486,000 | 789,000 | 13,275,000 | 13,403,000 | −1 |
| Dover AFB, DE | 10,946,000 | 2.386,000 | 13,332,000 | 12,919,000 | 3 |
| Fort Belvoir, VA | 35,132,000 | 6,623,000 | 41,755,000 | 39,840,000 | 5 |
| Fort Devens, MA | 28,205,000 | 5,211,000 | 33,416,000 | 32,624,000 | 2 |
| Fort Dix, NJ | 42,869,000 | 9,884,000 | 52,753,000 | 53,637,000 | −2 |
| Fort Drum, NY | 7,723,000 | 1,151,000 | 8,874,000 | 9,242,000 | −4 |
| Fort Eustis, VA | 19,438,000 | 4,240,000 | 23,678,000 | 22,624,000 | 5 |
| Fort George, MD | 31,574,000 | 4,461,000 | 36,035,000 | 34,328,000 | 5 |
| Fort Lee, VA | 22,755,000 | 6,195,000 | 28,950,000 | 27,788,000 | 4 |
| Fort Monmouth, NJ | 19,179,000 | 2,443,000 | 21,622,000 | 9,842,000 | 120 |
| Fort Myer, VA | 17,248,000 | 3,818,000 | 21,066,000 | 19,637,000 | 7 |
| Griffiss AFB, NY | 13,032,000 | 1,277,000 | 14,309,000 | 13,990,000 | 2 |
| Langley AFB, VA | 25,023,000 | 3,973,000 | 28,996,000 | 28,147,000 | 3 |
| Loring AFB, ME | 5,097,000 | 1,815,000 | 6,912,000 | 6,763,000 | 2 |
| Fort Hamilton, NY* | 0 | 0 | 0 | 10,416,000 | −100 |
| Pease AFB, NH | 14 238,000 | 1,519,000 | 15,757,000 | 15,507,000 | 2 |
| Plattsburgh AFB, NY | 8,107,000 | 1,010,000 | 9,117,000 | 8,659,000 | 5 |
| U.S. Military Academy | 10,264,000 | 2,350,000 | 12,614,000 | 12,041,000 | 5 |
| Walter Reed AMC, D.C. | 9,665,000 | 2,500,000 | 12,165,000 | 9,671,000 | 26 |
| Westover AFB, MA | 9,364,000 | 131,000 | 9,495,000 | 9,272,000 | 2 |
| **CPER Totals** | **$434,205,000** | **$74,014,000** | **$508,219,000** | **$491,010,000** | **4%** |

*Consolidated with Ft. Monmouth 1/25/85.





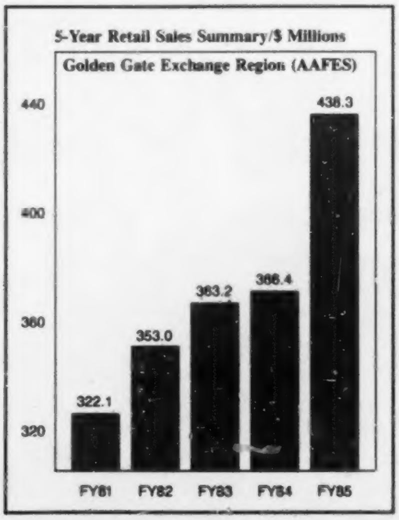


# AAFES Exchange Sales—FY85

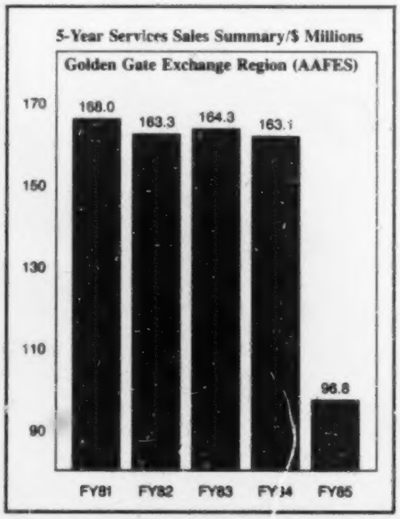
## Golden Gate Region (GGER)

| | FY 85 $ Sales | | | | |
|---|---|---|---|---|---|
| **Store** | **Retail** | **Services & Other** | **Total** | **Total $ Sales FY 84** | **Total Sales % Change 85 vs 84** |
| Beale AFB, CA | 11,411,000 | 1,651,000 | 13,062,000 | 13,168,000 | −1 |
| Castle AFB, CA | 11,669,000 | 2,039,000 | 13,708,000 | 13,744,000 | 0 |
| Davis-Monthan AFB, AZ | 16,905,000 | 2,946,000 | 19,851,000 | 18,914,000 | 5 |
| Edwards AFB, CA | 14,119,000 | 3,910,000 | 18,029,000 | 15,429,000 | 17 |
| Fairchild AFB, WA | 10,589,000 | 1,474,000 | 12,063,000 | 13,187,000 | −9 |
| Fort Huachuca, AZ | 13,328,000 | 3,981,000 | 17,309,000 | 16,437,000 | 5 |
| Fort Hunter Liggett, CA | 2,701,000 | 1,090,000 | 3,791,000 | 3,607,000 | 5 |
| Fort Irwin, CA | 6,455,000 | 2,167,000 | 8,622,000 | 7,943,000 | 9 |
| Fort Lewis, WA | 75,815,000 | 19,038,000 | 94,853,000 | 98,157,000 | −3 |
| Fort Ord, CA | 41,898,000 | 12,574,000 | 54,472,000 | 53,848,000 | 1 |
| George AFB, CA | 11,538,000 | 2,188,000 | 13,726,000 | 13,186,000 | 4 |
| Hill AFB, UT | 14,432,000 | 1,426,000 | 15,858,000 | 15,448,000 | 3 |
| Los Angeles AFS, CA | 14,496,000 | 1,568,000 | 16,064,000 | 16,453,000 | −2 |
| Luke AFB, AZ | 23,191,000 | 4,589,000 | 27,780,000 | 27,475,000 | 1 |
| Malstrom, MT | 5,286,000 | 1,197,000 | 6,483,000 | 6,860,000 | −5 |
| Mather AFB, CA* | 21,721,000 | 4,507,000 | 26,228,000 | 39,872,000 | −34 |
| McClellan AFB, CA* | 15,648,000 | 1,288,000 | 16,936,000 | 0 | – |
| Mountain Home AFB, ID | 8,089,000 | 1,715,000 | 9,804,000 | 10,019,000 | −2 |
| Nellis AFB, NV | 19,587,000 | 3,401,000 | 22,988,000 | 23,537,000 | −2 |
| Norton AFB, CA | 35,274,000 | 6,469,000 | 41,743,000 | 41,200,000 | 1 |
| Presidio of San Francisco, CA | 21,328,000 | 5,188,000 | 26,516,000 | 27,426,000 | −3 |
| Travis AFB, CA | 26,431,000 | 6,417,000 | 32,848,000 | 32,335,000 | 2 |
| Vandenberg AFB, CA | 15,786,000 | 5,475,000 | 21,261,000 | 20,606,000 | 3 |
| Yuma Proving Ground, AZ | 625,000 | 515,000 | 1,140,000 | 1,162,000 | −2 |
| **GGER Totals** | **$438,322,000** | **$96,813,000** | **$535,135,000** | **$530,013,000** | **1%** |

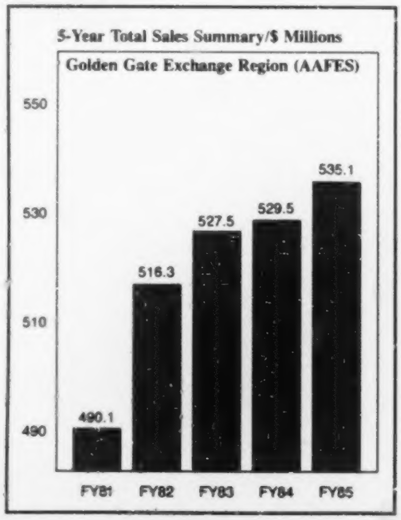
*Activated 8/25/85.


5-Year Retail Sales Summary/$ Millions

Golden Gate Exchange Region (AAFES)


5-Year Services Sales Summary/$ Millions

Golden Gate Exchange Region (AAFES)

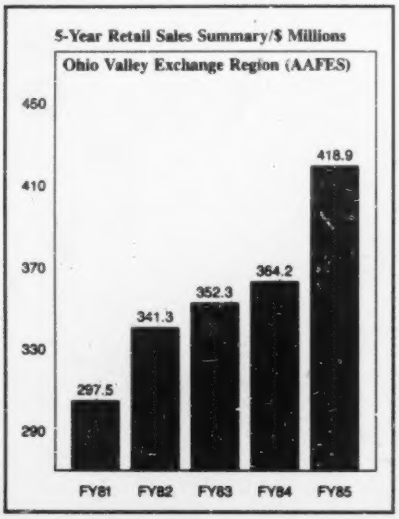

5-Year Total Sales Summary/$ Millions

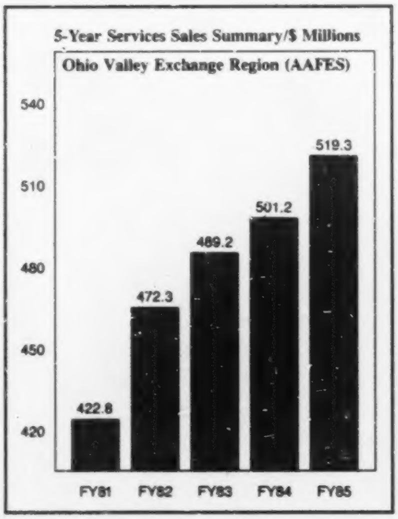
Golden Gate Exchange Region (AAFES)

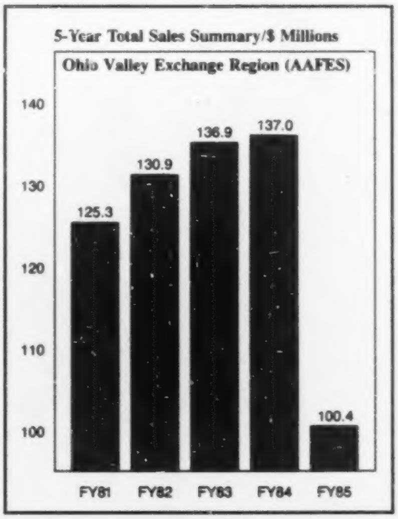
# AAFES Exchange Sales—FY85

## Ohio Valley Region (OVER)

| Store | FY 85 $ Sales<br>Retail | <br>Services & Other | <br>Total | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| Chanute AFB, IL | 16,578,000 | 4,744,000 | 21,322,000 | 19,976,000 | 7 |
| Colorado Springs, CO | 24,211,000 | 3,697,000 | 27,908,000 | 26,486,000 | 5 |
| Denver Exchange (Lowry AFB), CO | 34,988,000 | 7,476,000 | 42,464,000 | 38,179,000 | 11 |
| Ellsworth AFB, SD | 8,170,000 | 1,886,000 | 10,056,000 | 9,491,000 | 6 |
| Fort Benjamin Harrison, IN | 13,762,000 | 2,947,000 | 16,709,000 | 15,971,000 | 5 |
| Fort Campbell, KY | 36,565,000 | 10,358,000 | 46,923,000 | 45,533,000 | 3 |
| Fort Carson, CO | 24,179,000 | 8,172,000 | 32,351,000 | 30,159,000 | 7 |
| Fort Knox, KY | 36,103,000 | 14,497,000 | 50,600,000 | 48,210,000 | 5 |
| Fort Leavenworth, KS | 11,394,000 | 2,361,000 | 13,755,000 | 12,435,000 | 11 |
| Fort Leonard Wood, MO | 23,781,000 | 10,299,000 | 34,080,000 | 32,543,000 | 5 |
| Fort McCoy, WI | 10,531,000 | 882,000 | 11,413,000 | 11,338,000 | 1 |
| Fort Riley, KS | 21,808,000 | 7,515,000 | 29,323,000 | 28,031,000 | 5 |
| Fort Sheridan, IL | 7,377,000 | 639,000 | 8,016,000 | 8,296,000 | −3 |
| Francis E. Warren AFB, WY | 4,996,000 | 932,000 | 5,928,000 | 5,610,000 | 6 |
| Grand Forks AFB, ND | 11,600,000 | 2,472,000 | 14,072,000 | 13,918,000 | 1 |
| Grissom AFB, IN | 5,680,000 | 1,230,000 | 6,910,000 | 6,612,000 | 5 |
| K.I. Sayer AFB, MI | 8,079,000 | 1,563,000 | 9,642,000 | 9,281,000 | 4 |
| McConnell AFB, KS | 6,327,000 | 1,049,000 | 7,376,000 | 7,310,000 | 1 |
| Minot AFB, ND | 9,726,000 | 2,811,000 | 12,537,000 | 12,167,000 | 3 |
| Oakdale ADS, PA | 4,284,000 | 143,000 | 4,427,000 | 4,957,000 | −11 |
| Offutt AFB, NE | 21,376,000 | 4,381,000 | 25,757,000 | 26,497,000 | −3 |
| Rickenbacker ANG, OH | 3,798,000 | 176,000 | 3,974,000 | 5,720,000 | −31 |
| Scott AFB, IL | 22,726,000 | 4,385,000 | 27,111,000 | 27,021,000 | 0 |
| Selfridge ANG, MI | 8,455,000 | 647,000 | 9,102,000 | 8,674,000 | 5 |
| Tullahoma (Arnold AFS), TN | 4,484,000 | 5,000 | 4,489,000 | 4,032,000 | 11 |
| Whiteman AFB, MO | 6,102,000 | 968,000 | 7,070,000 | 7,072,000 | 0 |
| Wright-Patterson AFB, OH | 23,543,000 | 3,307,000 | 26,850,000 | 26,263,000 | 2 |
| Wurtsmith AFB, MI | 8,238,000 | 934,000 | 9,172,000 | 9,485,000 | −3 |
| **OVER Totals** | **$418,861,000** | **$100,476,000** | **$519,337,000** | **$501,267,000** | **4%** |



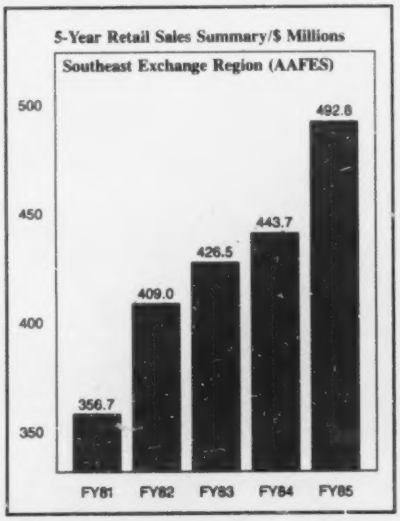




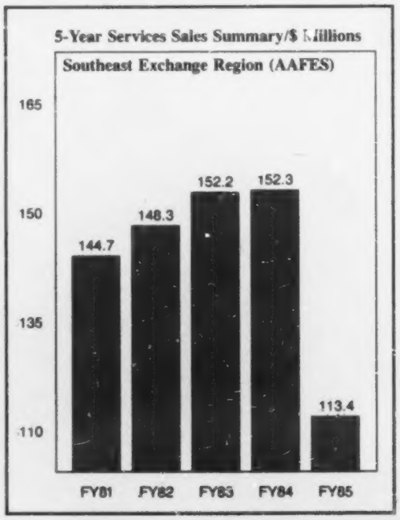
## AAFES Exchange Sales—FY85

### Southeast Region (SEER)

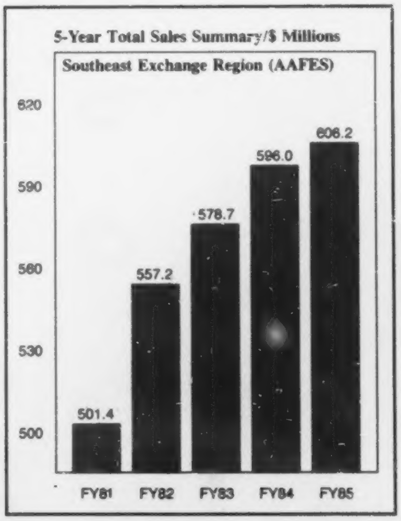
| Store | FY 85 $ Sales<br>Retail | <br>Services & Other | <br>Total | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| Charleston AFB, SC | 10,734,000 | 1,988,000 | 12,722,000 | 13,933,000 | −9 |
| Columbus AFB, MS | 5,666,000 | 779,000 | 6,445,000 | 6,358,000 | 1 |
| Eglin AFB, FL | 26,453,000 | 4,942,000 | 31,395,000 | 29,941,000 | 5 |
| Fort Benning, GA | 49,343,000 | 15,429,000 | 64,772,000 | 60,773,000 | 7 |
| Fort Bragg, NC | 52,793,000 | 21,076,000 | 73,869,000 | 73,745,000 | 0 |
| Fort Gordon, GA | 27,737,000 | 11,673,000 | 39,410,000 | 35,422,000 | 11 |
| Fort Jackson, SC | 34,354,000 | 5,857,000 | 40,211,000 | 41,965,000 | −4 |
| Fort McClellan, AL | 20,383,000 | 4,859,000 | 25,242,000 | 26,510,000 | −5 |
| Fort McPherson, GA | 16,480,000 | 2,373,000 | 18,853,000 | 17,926,000 | 5 |
| Fort Rucker, AL | 18,094,000 | 4,593,000 | 22,687,000 | 21,793,000 | 4 |
| Fort Stewart, GA | 26,574,000 | 8,081,000 | 34,655,000 | 33,668,000 | 3 |
| Homestead AFB, FL | 18,785,000 | 2,998,000 | 21,783,000 | 21,837,000 | 0 |
| Hurlburt Field, FL | 5,096,000 | 647,000 | 5,743,000 | 5,508,000 | 4 |
| Keesler AFB, MS | 34,589,000 | 6,635,000 | 41,224,000 | 40,511,000 | 2 |
| MacDill AFB, FL | 27,230,000 | 4,280,000 | 31,510,000 | 32,877,000 | −4 |
| Maxwell AFB, AL | 21,339,000 | 2,810,000 | 24,149,000 | 24,524,000 | −2 |
| Moody AFB, GA | 5,894,000 | 925,000 | 6.819,000 | 6,900,000 | −1 |
| Myrtle Beach AFB, SC | 9,033,000 | 1,522,000 | 10,555,000 | 10,757,000 | −2 |
| Patrick AFB, FL | 20,840,000 | 2,858,000 | 23,698,000 | 22,215,000 | 7 |
| Redstone Arsenal, AL | 15,402,000 | 2,160,000 | 17,562,000 | 17,164,000 | 2 |
| Robins AFB, GA | 12,721,000 | 1,213,000 | 13,934,000 | 13,508,000 | 3 |
| Seymour Johnson AFB, SC | 9,314,000 | 1,587,000 | 10,901,000 | 10,750,000 | 1 |
| Shaw AFB, SC | 12,866,000 | 1,764,000 | 14,630,000 | 14,265,000 | 3 |
| Tyndall AFB, FL | 11,066,000 | 2,341,000 | 13,407,000 | 13,205,000 | 2 |
| **SEER Totals** | **$492,786,000** | **$113,390,000** | **$606,176,000** | **$596,055,000** | **2%** |


5-Year Retail Sales Summary/$ Millions

Southeast Exchange Region (AAFES)


5-Year Services Sales Summary/$ Millions

Southeast Exchange Region (AAFES)


5-Year Total Sales Summary/$ Millions

Southeast Exchange Region (AAFES)

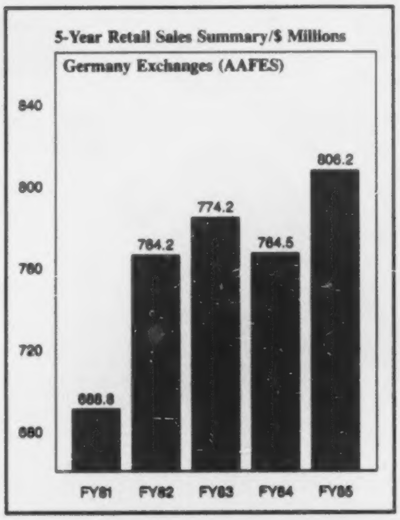
## Totals

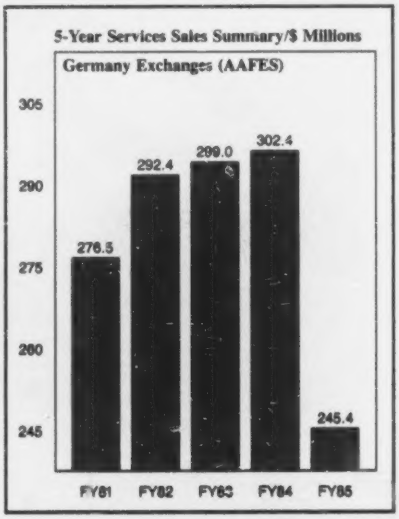
| | FY 85 $ Sales | | | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| **CONUS Totals** | **$2,249,264,000** | **$492,711,000** | **$2,741,975,000** | **$2,671,008,000** | **3%** |

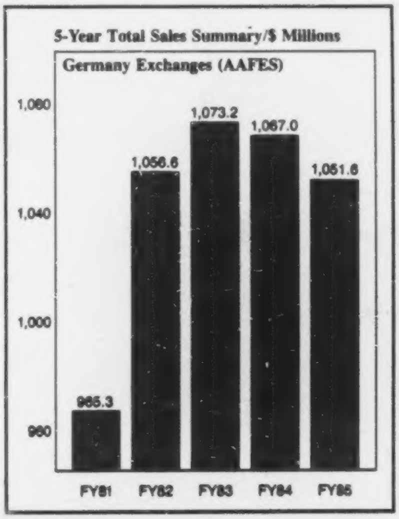
# Europe

## Germany

| Exchange Area | FY 85 $ Sales | | | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| Chievres Exchange (Belgium) | 10,712,000 | 2,617,000 | 13,329,000 | 10,693,000 | 25 |
| Frankfurt Area (FRAX) | 223,278,000 | 65,322,000 | 288,600,000 | 282,542,000 | 2 |
| Kaiserslauten Area (KAAX) | 176,554,000 | 52,626,000 | 229,180,000 | 219,030,000 | 5 |
| Nuremberg Area (NUAX) | 139,709,000 | 48,954,000 | 188,663,000 | 192,398,000 | −2 |
| Spangdahlem Area (SAAX) | 119,648,000 | 30,397,000 | 150,045,000 | 147,521,000 | 2 |
| Stuttgart Area (SGAX) | 146,984,000 | 48,147,000 | 195,131,000 | 200,120,000 | −2 |
| **Germany Exchanges' Totals** | **$806,173,000** | **$245,446,000** | **$1,051,619,000** | **$1,041,611,000** | **1%** |


5-Year Retail Sales Summary/$ Millions


5-Year Services Sales Summary/$ Millions

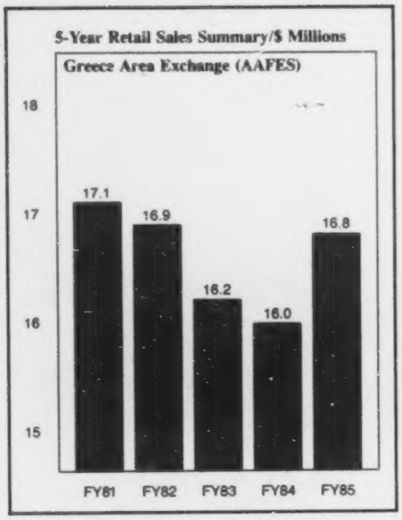

5-Year Total Sales Summary/$ Millions

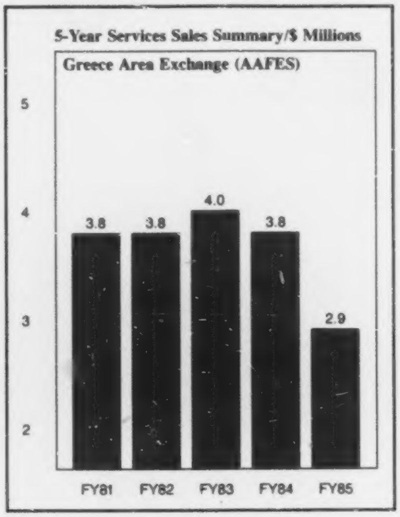
## Germany—Other

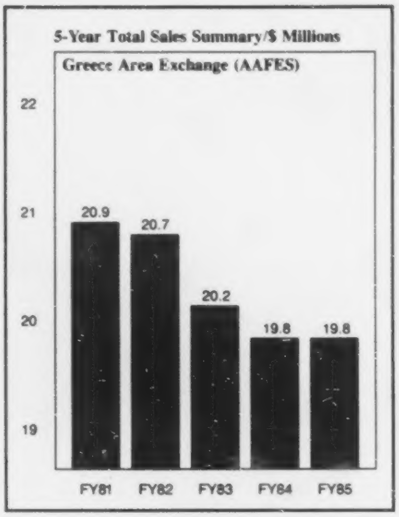
| Exchange | FY 85 $ Sales | | | Total $ Sales Total | Total Sales % Change FY 84 |
|---|---|---|---|---|---|
| | | Services Sales84 | & Other | | |
| Giessen Depot | 77,000 | 0 | 77,000 | 92,000 | −16 |
| Gruenstadt Depot | $1,894,000 | $0 | $1,894,000 | $1,835,000 | 3% |

## Greece

| Exchange Area | FY 85 $ Sales | | | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| Greece Area Exchange (GRAX) | $16,843,000 | $2,938,000 | $19,781,000 | $19,825,000 | 0% |


5-Year Retail Sales Summary/$ Millions

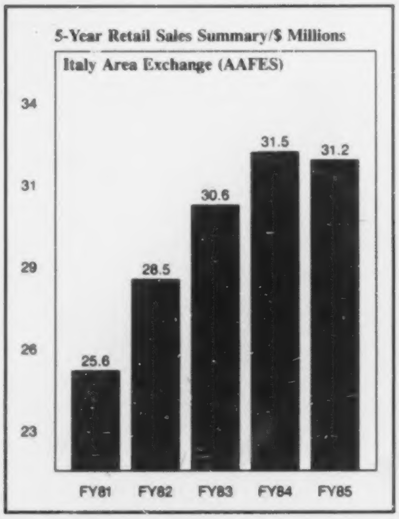

5-Year Services Sales Summary/$ Millions

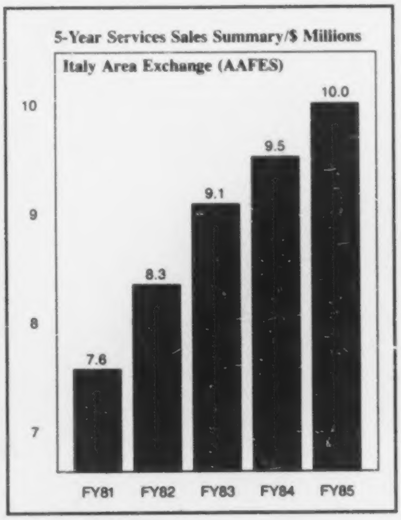

5-Year Total Sales Summary/$ Millions

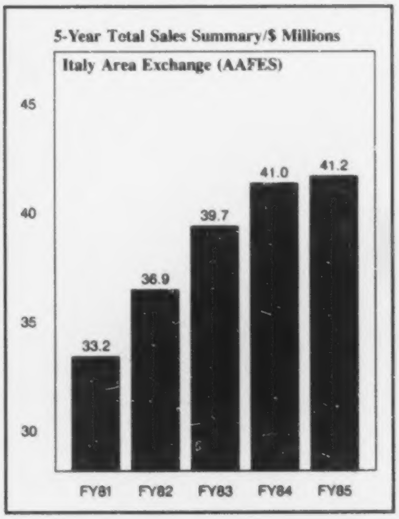
## AAFES Exchange Sales—FY85

### Italy

| Exchange Area | FY 85 $ Sales<br>Retail | Services & Other | Total | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| Italy Area (ITAX) | $31,170,000 | $10,011,000 | $41,181,000 | $41,015,000 | 0% |


5-Year Retail Sales Summary/$ Millions

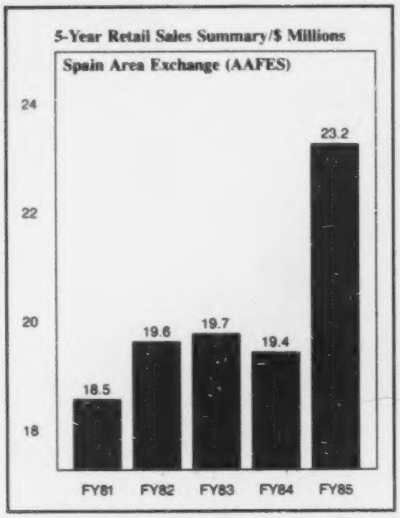

5-Year Services Sales Summary/$ Millions

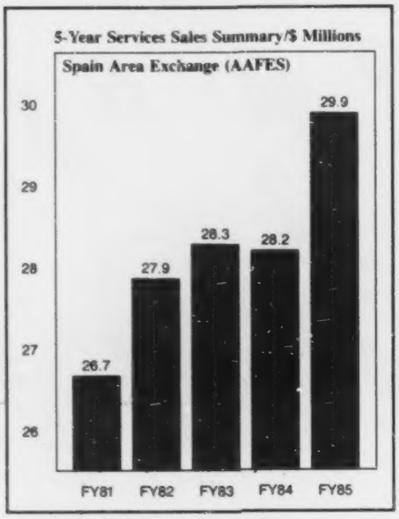

5-Year Total Sales Summary/$ Millions

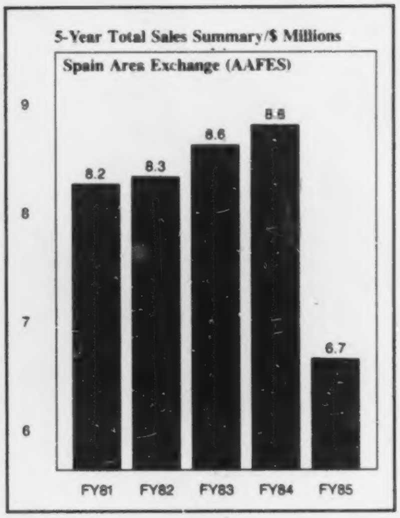
## AAFES Exchange Sales—FY85

### Spain

| Exchange Area | FY 85 $ Sales<br>Retail | Services & Other | Total | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| Spain Area (SPAX) | $23,204,000 | $6,657,000 | $29,861,000 | $28,229,000 | 6% |



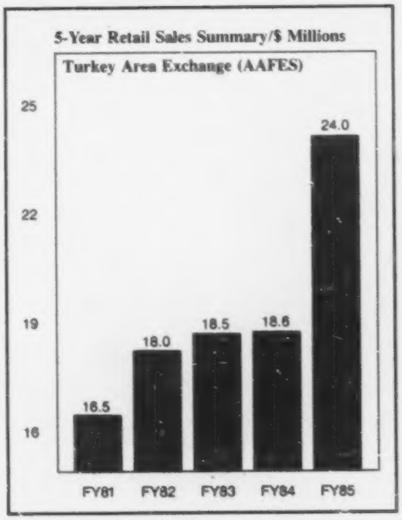


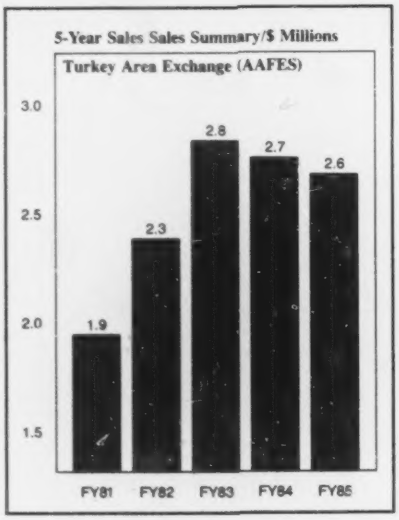


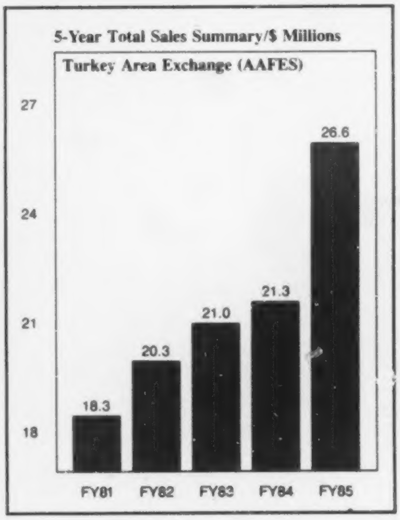
## Turkey

| Exchange Area | FY 85 $ Sales<br>Retail | Services & Other | Total | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| Turkey Area (TUAX)* | $24,018,000 | $2,626,000 | $26,644,000 | $21,339,000 | 25% |

*Saudi Arabia exchange transferred to TUAX 1/25/85.

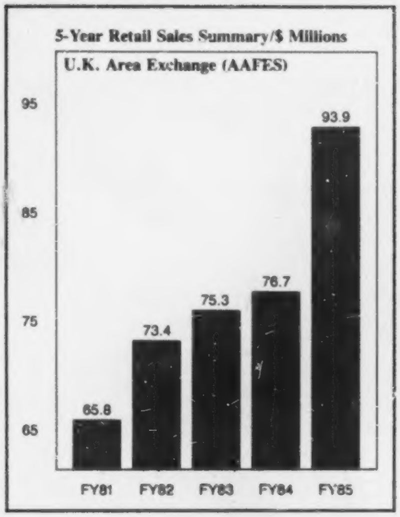




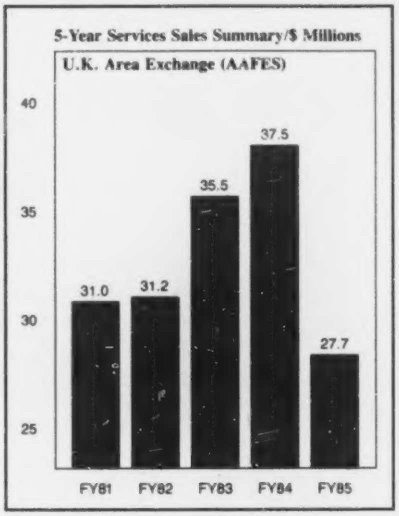


## United Kindgom

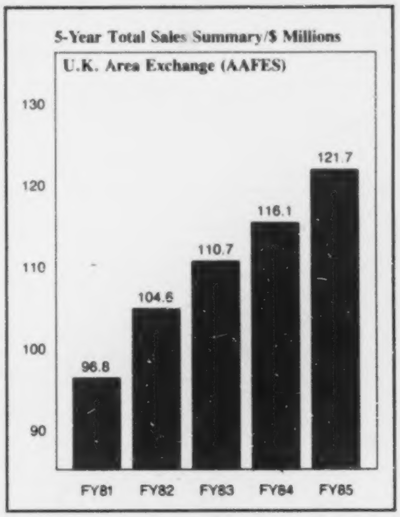
| Exchange Area | FY 85 $ Sales<br>Retail | Services & Other | Total | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| United Kingdom Area (UKAX) | $93,949,000 | $27,741,000 | $121,690,000 | $116,136,000 | 5% |



5-Year Retail Sales Summary/$ Millions



5-Year Services Sales Summary/$ Millions



5-Year Total Sales Summary/$ Millions

## AAFES Exchange Sales—FY85

### Totals

| | FY 85 $ Sales | | | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| **AAFES Europe Totals** | **$1,008,040,000** | **$298,036,000** | **$1,306,076,000** | **$1,280,775,000** | **2%** |

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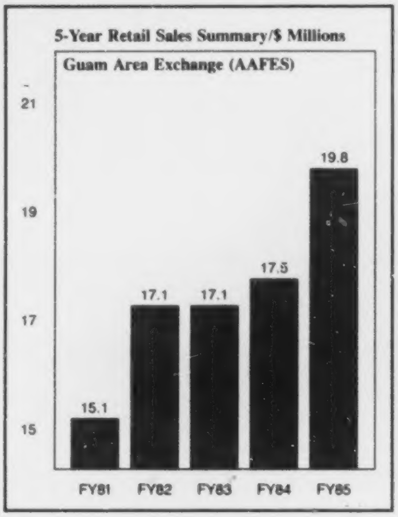
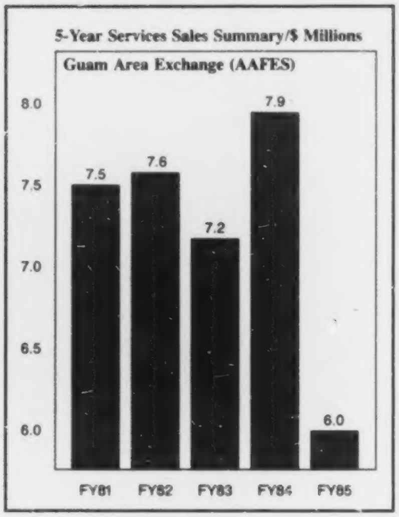
# AAFES Exchange Sales—FY85 (Pacific)

## Guam

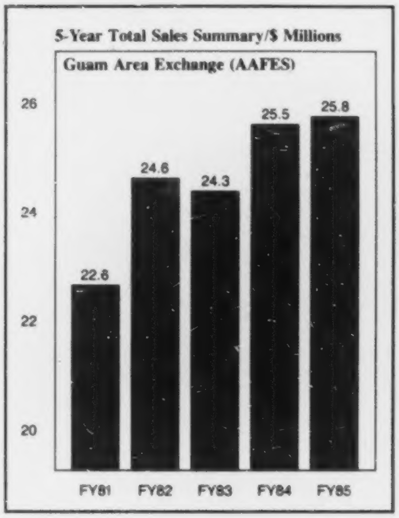
| | FY 85 $ Sales | | | Total $ Sales | Total Sales % Change |
|---|---|---|---|---|---|
| Exchange Area | Retail | Services & Other | Total | FY 84 | 85 vs 84 |
| Guam Area (GUAX) | $19,791,000 | $5,962,000 | $25,753,000 | $25,508,000 | 1% |


5-Year Retail Sales Summary/$ Millions

Guam Area Exchange (AAFES)


5-Year Services Sales Summary/$ Millions

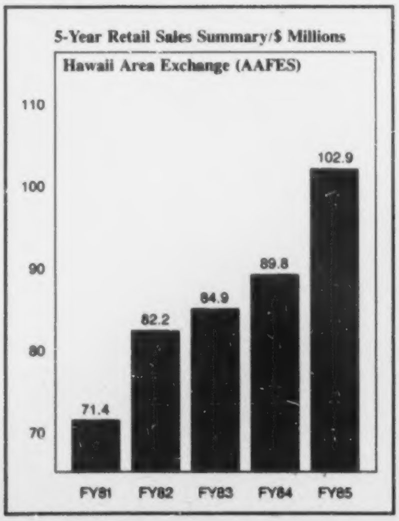
Guam Area Exchange (AAFES)


5-Year Total Sales Summary/$ Millions

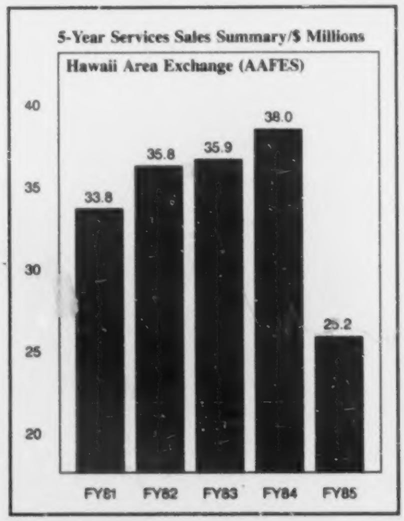
Guam Area Exchange (AAFES)

## Hawaii

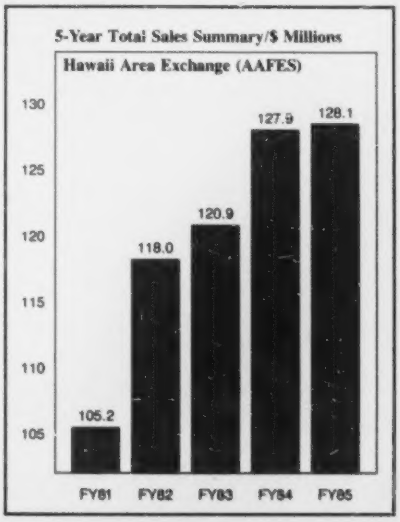
| | FY 85 $ Sales | | | Total $ Sales | Total Sales % Change |
|---|---|---|---|---|---|
| Exchange Area | Retail | Services & Other | Total | FY 84 | 85 vs 84 |
| Hawaii Area (HAAX) | $102,934,000 | $25,164,000 | $128,098,000 | $127,855,000 | 0% |


5-Year Retail Sales Summary/$ Millions

Hawaii Area Exchange (AAFES)


5-Year Services Sales Summary/$ Millions

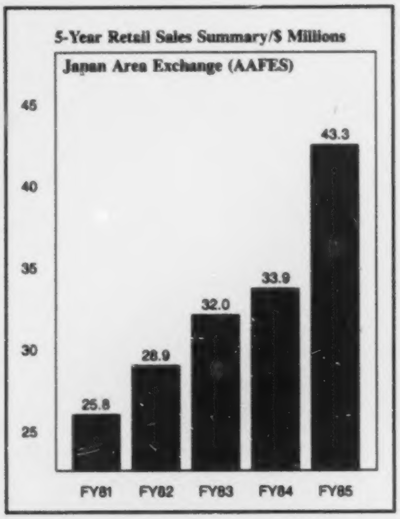
Hawaii Area Exchange (AAFES)


5-Year Total Sales Summary/$ Millions

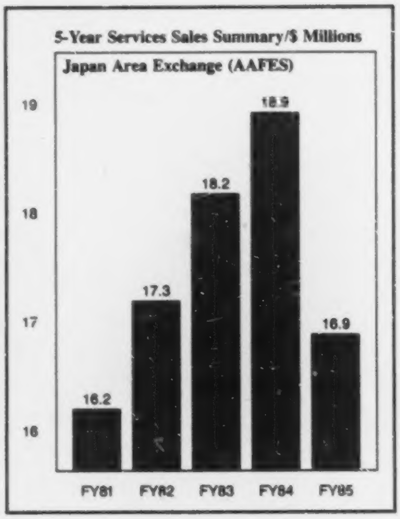
Hawaii Area Exchange (AAFES)

## Japan

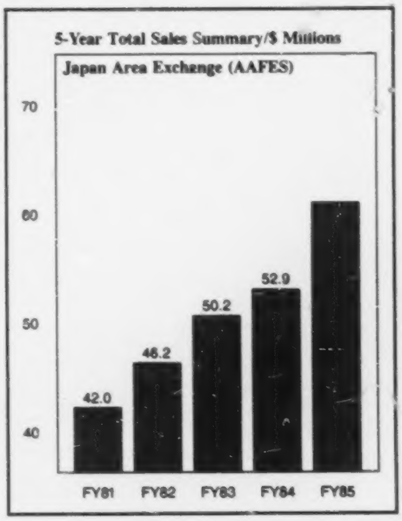
| Exchange Area | FY 85 $ Sales | | | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| Japan Area (JAAX) | $43,308,000 | $16,870,000 | $60,178,000 | $52,899,000 | 14% |


5-Year Retail Sales Summary/$ Millions

Japan Area Exchange (AAFES)


5-Year Services Sales Summary/$ Millions

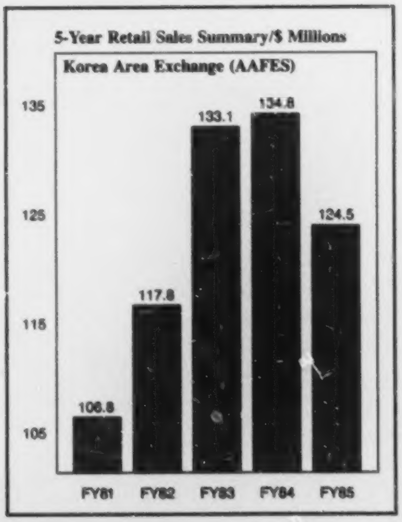
Japan Area Exchange (AAFES)


5-Year Total Sales Summary/$ Millions

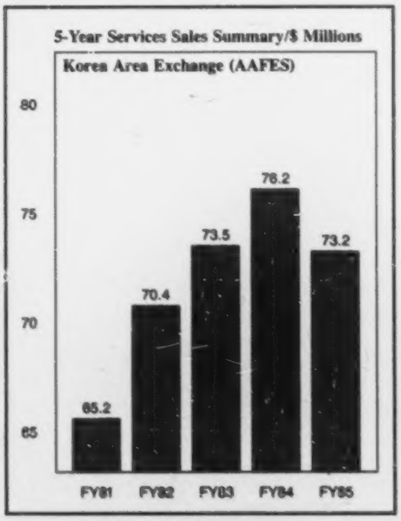
Japan Area Exchange (AAFES)

## Korea

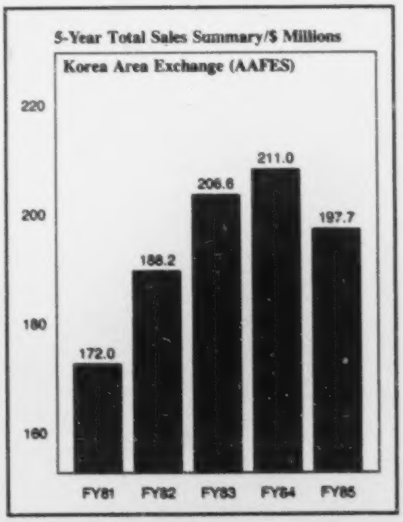
| Exchange Area | FY 85 $ Sales | | | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| Korea Area (KOAX) | $124,483,000 | $73,173,000 | $197,656,000 | $211,010,000 | −6% |


5-Year Retail Sales Summary/$ Millions

Korea Area Exchange (AAFES)


5-Year Services Sales Summary/$ Millions

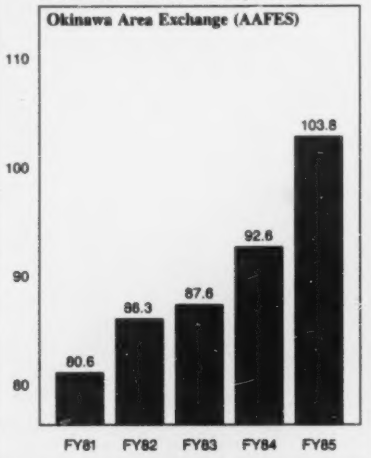
Korea Area Exchange (AAFES)

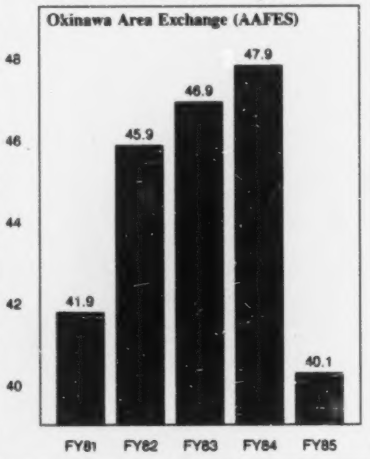

5-Year Total Sales Summary/$ Millions

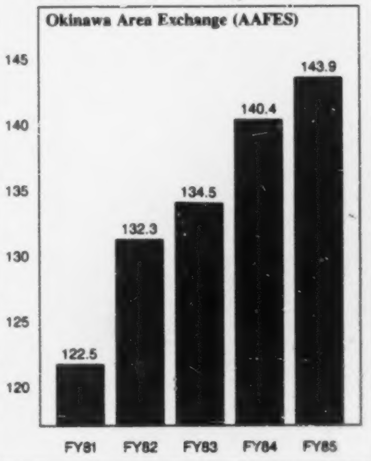
Korea Area Exchange (AAFES)

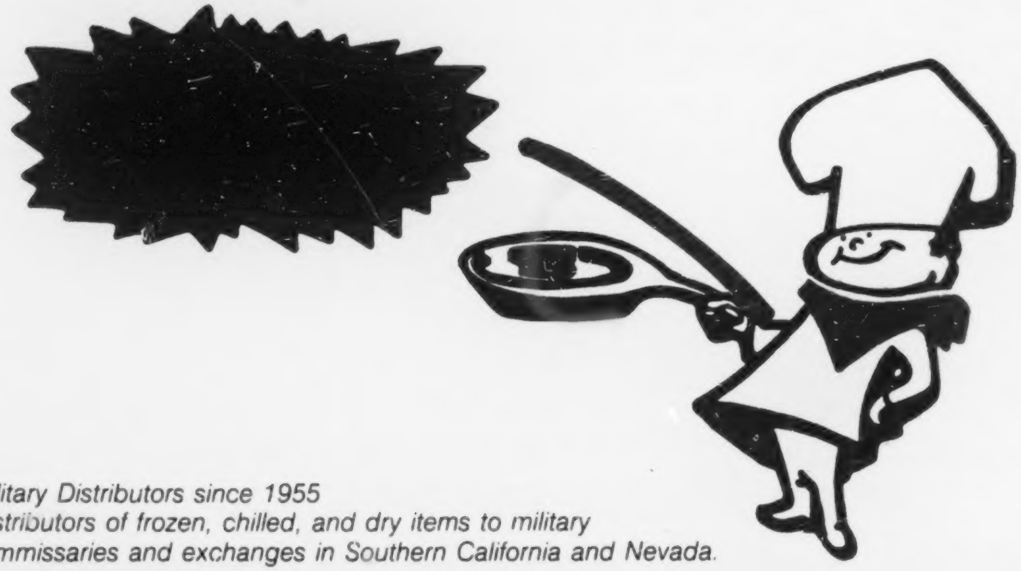
## Okinawa

| Exchange Area | FY 85 $ Sales Retail | FY 85 $ Sales Services & Other | FY 85 $ Sales Total | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| Okinawa Area (OKAX) | $103,808,000 | $40,058,000 | $143,866,000 | $140,414,000 | 2% |


5-Year Retail Sales Summary/$ Millions


5-Year Services Sales Summary/$ Millions


5-Year Total Sales Summary/$ Millions



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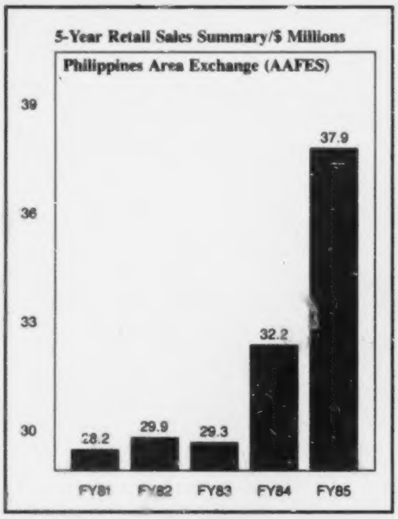
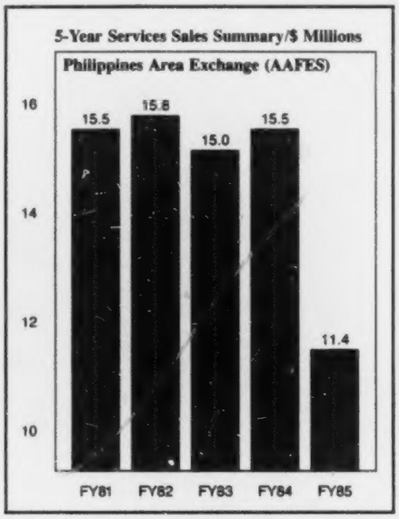
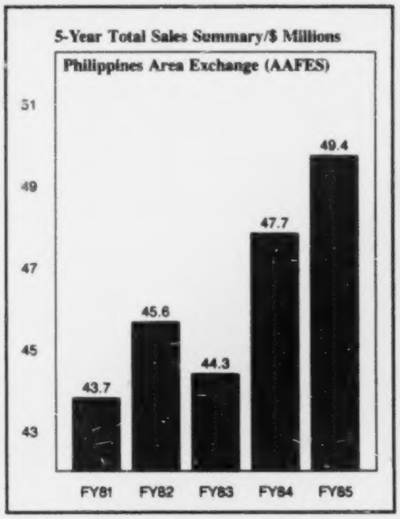
## Philippines

| Exchange Area | FY 85 $ Sales |  |  | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
|  | Retail | Services & Other | Total |  |  |
| Philippines Area (PHAX) | $37,935,000 | $11,439,000 | $49,374,000 | $47,659,000 | 4% |


5-Year Retail Sales Summary/$ Millions


5-Year Services Sales Summary/$ Millions


5-Year Total Sales Summary/$ Millions

## Totals

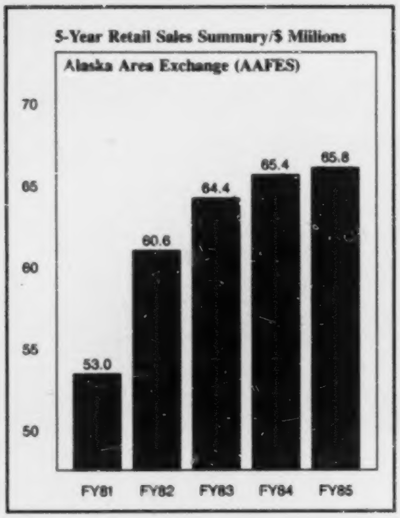
|  | FY 85 $ Sales |  |  | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
|  | Retail | Services & Other | Total |  |  |
| **AAFES—Pacific Totals** | **$432,259,000** | **$172,666,000** | **$604,925,000** | **$605,345,000** | **0%** |

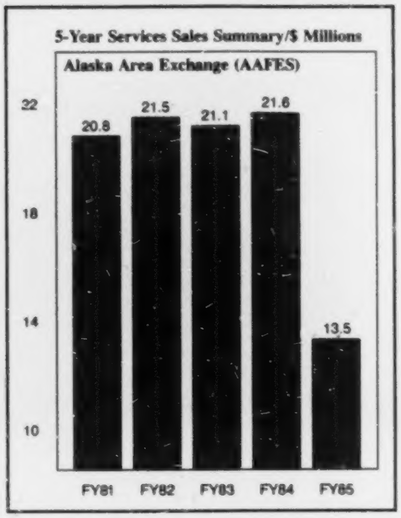
# AAFES Exchange Sales—FY85 (Other—Overseas)

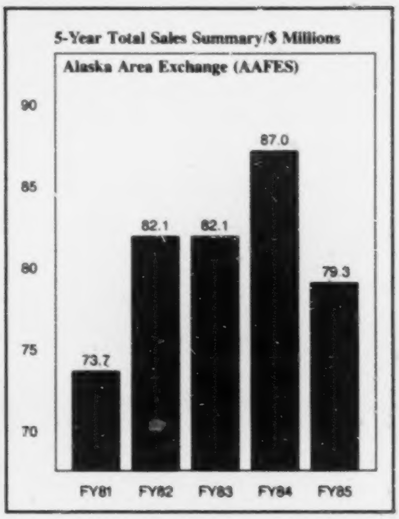
## Alaska

| Exchange Area | FY 85 $ Sales |  |  | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
|  | Retail | Services & Other | Total |  |  |
| Elmendorf AFB/Fort Richardson (Anchorage) | 39,485,000 | 9,512,000 | 48,997,000 | 54,255,000 | −10 |
| Fort Greely (Big Delta)* | 0 | 0 | 0 | 3,363,000 | −100 |
| Fort Wainwright (Fairbanks)* | 0 | 0 | 0 | 26,631,000 | −100 |
| Northern Alaska (eff 1/25/85) | 24,980,000 | 3,758,000 | 28,738,000 | 0 | – |
| "Remote Sites" | 1,342,000 | 228,000 | 1,570,000 | 2,759,000 | −43 |
| **AKAX Totals** | **$65,807,000** | **$13,498,000** | **$79,305,000** | **$87,008,000** | **−9%** |

*Consolidated with Northern Alaska 1/25/85.







## Azores

| Exchange | FY 85 $ Sales<br>Retail | <br>Services & Other | <br>Total | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| Azores | $8,174,000 | $2,020,000 | $10,194,000 | $9,305,000 | 10% |

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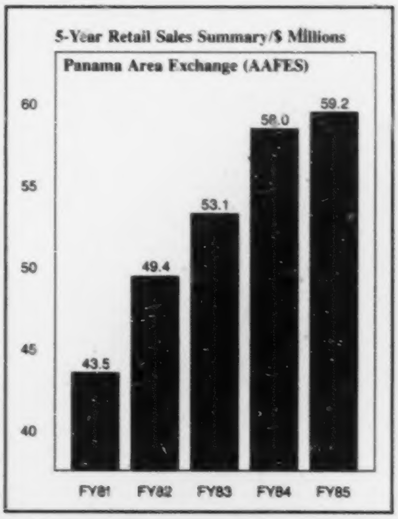
## Greenland

| Exchange | FY 85 $ Sales Retail | FY 85 $ Sales Services & Other | FY 85 $ Sales Total | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| Sondrestrom AB | $1,299,000 | $53,000 | $1,352,000 | $1,321,000 | 2% |
| Thule AB | $2,612,000 | $69,000 | $2,681,000 | $3,015,000 | −11% |

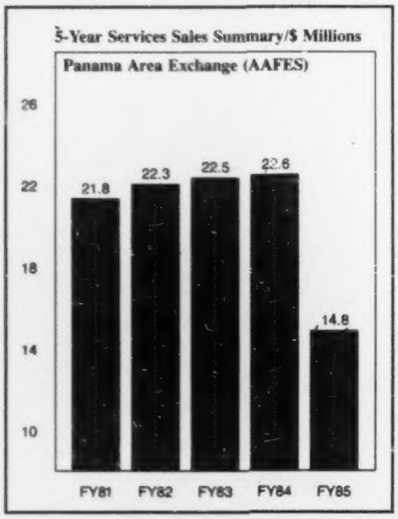
## Panama

| Exchange Area | FY 85 $ Sales Retail | FY 85 $ Sales Services & Other | FY 85 $ Sales Total | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| Panama Area (PAAX) | $59,174,000 | $14,789,000 | $73,963,000 | $80,548,000 | −8% |



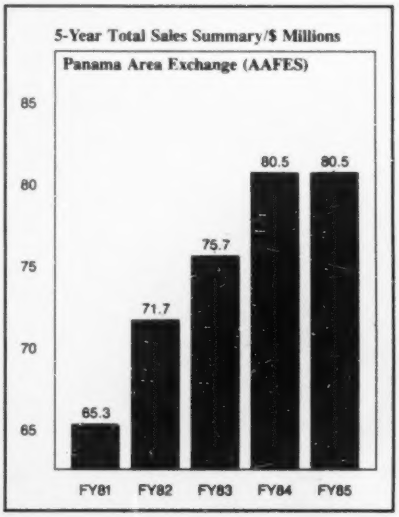
5-Year Retail Sales Summary/$ Millions

Panama Area Exchange (AAFES)



5-Year Services Sales Summary/$ Millions

Panama Area Exchange (AAFES)



5-Year Total Sales Summary/$ Millions

Panama Area Exchange (AAFES)

## Puerto Rico

| Exchange Area | FY 85 $ Sales Retail | FY 85 $ Sales Services & Other | FY 85 $ Sales Total | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| Puerto Rico (PRAX) | $35,897,000 | $2,098,000 | $37,995,000 | $37,574,000 | 1% |

## Totals

|  | FY 85 $ Sales Retail | FY 85 $ Sales Services & Other | FY 85 $ Sales Total | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| **Overseas Totals** | **$1,577,400,897** | **$501,133,098** | **$2,078,533,995** | **$2,067,354,574** | **1%** |
| **Worldwide Totals** | **$3,826,664,897** | **$993,844,098** | **$4,820,508,995** | **$4,738,362,574** | **2%** |

# Coast Guard NAFA Sales—FY85 Continental U.S.

## Coast Guard Cutters

| | FY 85 $ Sales | | | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| Coast Guard Cutters | $240,994 | | $473,278 | $526,868 | −10 |

## NAFAs

| | FY 85 $ Sales | | | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| Store | Retail | Services & Other | Total | | |
| Alameda, CA | 877,955 | 341,306 | 1,219,261 | 1,190,124 | 2 |
| Alexandria, VA | 33,719 | 78,868 | 112,587 | 116,848 | −4 |
| Atlantic Beach, NC | 31,164 | 26,259 | 57,423 | 45,260 | 27 |
| Baltimore, MD | 498,922 | 333,511 | 832,433 | 970,390 | −14 |
| Boston, MA | 1,219,257 | 327,966 | 1,547,223 | 1,465,747 | 6 |
| Brooklyn, NY | 2,402,703 | 1,067,187 | 3,469,890 | 2,862,593 | 21 |
| Buffalo, NY | 198,088 | 5,935 | 204,023 | 204,599 | 0 |
| Cape Cod, MA | 2,719,830 | 6,096,000 | 8,815,830 | 8,553,555 | 3 |
| Cape May, NJ | 1,858,217 | 1,291,866 | 3,150,083 | 2,948,519 | 7 |
| Charlestown, SC | 262,175 | 838,378 | 1,100,553 | 1,023,499 | 8 |
| Clearwater, FL | 1,157,326 | 663,145 | 1,820,471 | 1,683,359 | 8 |
| Cleveland, OH | 711,080 | 319,296 | 1,030,376 | 870,575 | 18 |
| Detroit, MI | 580,850 | 61,648 | 642,498 | 526,467 | 22 |
| Elizabeth City , NC | 1,439,267 | 515,555 | 1,954,822 | 1,833,619 | 7 |
| Galena Park, TX | 45,708 | 7,058 | 52,766 | 66,369 | −20 |
| Galveston, TX | 293,454 | 95,388 | 388,842 | 409,842 | −5 |
| Gloucester City, NJ | 593,816 | 0 | 593,816 | 621,098 | −4 |
| Governors Island, NY | 3,123,111 | 2,286,420 | 5,409,531 | 5,918,232 | −9 |
| Long Island, NY | 484,267 | 0 | 484,267 | 652,897 | −26 |
| Mayport, FL | 1,006,837 | 7,105 | 1,013,942 | 1,010,600 | 0 |
| McKinleyville, CA | 83,580 | 8,654 | 92,234 | 104,781 | −12 |
| Miami Beach, FL | 382,926 | 146,177 | 529,103 | 512,102 | 3 |
| Milwaukee, WI | 148,593 | 8,244 | 156,837 | 155,846 | 1 |
| Mobile (Base), AL | 1,389,426 | 861,985 | 2,251,411 | 2,239,666 | 1 |
| Mobile, AL (ATC) | 1,753,335 | 7,876,245 | 9,629,580 | 9,595,200 | 0 |
| Muskegon, MI | 356,746 | 93,637 | 450,383 | 451,054 | 0 |
| New Haven, CT | 3,758,568 | 1,538,165 | 5,296,733 | 5,177,744 | 2 |
| New Orleans, LA | 332,785 | 37,099 | 369,884 | 355,702 | 4 |
| North Bend, OR | 74,512 | 347,026 | 421,538 | 406,135 | 4 |
| Opa Locka, FL | 2,297,558 | 2,643,163 | 4,940,721 | 4,795,894 | 3 |
| Petaluma, CA | 865,660 | 271,737 | 1,137,397 | 1,573,779 | −28 |
| Port Angeles, WA | 366,653 | 329,167 | 695,820 | 787,701 | −12 |
| Portland, OR | 98,720 | 54,291 | 153,011 | 61,980 | 147 |
| Portsmouth, VA | 837,610 | 448,021 | 1,285,631 | 1,319,906 | −3 |
| San Diego, CA | 56,416 | 18,767 | 75,183 | 90,333 | −17 |
| San Pedro, CA | 152,396 | 45,313 | 197,709 | 271,799 | −27 |
| Sault St. Marie, MI | 160,337 | 27,538 | 187,875 | 183,416 | 2 |
| Seattle, WA | 856,781 | 686,964 | 1,543,745 | 1,676,365 | −8 |
| South Portland, ME | 2,109,845 | 680,043 | 2,789,888 | 2,721,698 | 3 |
| St. Louis, MO | 388,804 | 174,464 | 563,268 | 600,321 | −6 |
| St. Petersburg, FL | 3,295,076 | 3,828,477 | 7,123,553 | 7,142,893 | 0 |
| Traverse City, MI | 216,870 | 619,879 | 836,749 | 901,568 | −7 |
| Warrenton, OR | 508,610 | 809,388 | 1,317,998 | 1,146,948 | 15 |
| Yorktown, VA | 1,323,454 | 597,494 | 1,920,948 | 1,924,509 | 0 |

# Coast Guard NAFA Sales—FY85

## Totals

| | FY 85 $ Sales | | | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| **CONUS Totals** | **$41,594,001** | **$36,514,829** | **$78,341,114** | **$77,698,400** | **1%** |

## Alaska

| | FY 85 $ Sales | | | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| Juneau, AK | 461,824 | 30,799 | 492,623 | 991,569 | −50 |
| Ketchikan, AK | 476,384 | 107,770 | 584,154 | 570,259 | 2 |
| Kodiak, AK | 3,342,348 | 2,387,714 | 5,730,062 | 5,032,233 | 14 |
| Sitka, AK | 289,520 | 74,699 | 364,219 | 357,977 | 2 |
| **Alaska Totals** | **$4,570,076** | **$2,600,982** | **$7,171,058** | **$6,952,038** | **3%** |

## Hawaii

| | | | | | |
|---|---|---|---|---|---|
| Barbers Point, HI | 0 | 178,298 | 178,298 | 112,128 | 59 |
| Honolulu, HI | 1,604,142 | 2,866,807 | 4,470,949 | 4,002,921 | 12 |
| **Hawaii Totals** | **$1,604,142** | **$3,045,105** | **$4,649,247** | **$4,115,049** | **13%** |

## Italy

| | | | | | |
|---|---|---|---|---|---|
| Lampedusa | 20,357 | 3,835 | 24,192 | 30,689 | −21 |
| Sellia Marina | 24,518 | 0 | 24,518 | 23,578 | 4 |
| **Italy Totals** | **$44,875** | **$3,835** | **$48,710** | **$54,267** | **−10%** |

## Puerto Rico

| | | | | | |
|---|---|---|---|---|---|
| Aquadilla | 2,126,546 | 3,793,553 | 5,920,099 | 5,813,004 | 2 |
| San Juan | 1,616,986 | 1,811,066 | 3,428,052 | 2,766,512 | 24 |
| **Puerto Rico Totals** | **$3,743,532** | **$5,604,619** | **$9,348,151** | **$8,579,516** | **9%** |

## Spain

| | | | | | |
|---|---|---|---|---|---|
| Estaritt | 44,431 | 459 | 44,890 | 12,288 | 265 |

## Turkey

| | | | | | |
|---|---|---|---|---|---|
| Kargabarun | 11,320 | 0 | 11,320 | 7,232 | 57 |

## United Kingdom

| | | | | | |
|---|---|---|---|---|---|
| Sylt | 18,456 | 1,867 | 20,323 | 14,189 | 43 |

## Totals

| | | | | | |
|---|---|---|---|---|---|
| **Overseas Totals** | **$10,036,832** | **$11,256,867** | **$21,293,699** | **$19,734,579** | **8%** |
| **Worldwide Totals** | **$51,871,827** | **$47,771,696** | **$100,108,091** | **$97,959,847** | **2%** |

# Navy Exchange Sales—FY 85

## Summary of Sales by Retail Department

| Department/Dept. Code | Continental U.S. $ Sales | Continental U.S. % | Overseas $ Sales | Overseas % | Worldwide $ Sales | Worldwide % |
|---|---|---|---|---|---|---|
| Auto Accessories/C8 | 20,640,148 | 2.7 | 6,901,234 | 2.0 | 27,541,383 | 2.5 |
| Beverages (Beer & Soda)/A6 | 44,986,033 | 5.9 | 21,875,958 | 6.4 | 66,861,992 | 6.1 |
| Books & Periodicals/C7 | 12,657,844 | 1.7 | 5,530,181 | 1.6 | 18,188,026 | 1.7 |
| Boys' Wear/G2 | 8,226,559 | 1.1 | 2,119,288 | 0.6 | 10,345,847 | 0.9 |
| Cameras & Equipment/B1 | 9,692,621 | 1.3 | 7,835,819 | 2.3 | 17,528,441 | 1.6 |
| Candy & Confections/A1 | 12,585,287 | 1.7 | 5,391,297 | 1.6 | 17,976,585 | 1.6 |
| Consumer Electronics & Musical Instruments/B5 | 47,799,126 | 6.3 | 64,721,913 | 18.8 | 112,521,040 | 10.2 |
| Domestics/E4 | 14,492,339 | 1.9 | 6,102,829 | 1.8 | 20,595,169 | 1.9 |
| Electrical Appliances/B4 | 18,873,844 | 2.5 | 15,894,164 | 4.6 | 34,768,008 | 3.2 |
| Fabrics & Sewing Accessories/F2 | 53 | a | 2,062,382 | 0.6 | 2,062,435 | 0.2 |
| Family Shoes/E7 | 17,428,308 | 2.3 | 5,320,196 | 1.5 | 22,748,505 | 2.1 |
| Film & Accessories/A7 | 7,873,698 | 1.0 | 2,991,267 | 0.9 | 10,864,965 | 1.0 |
| Food (Convenience Products)/A4 | 37,762,519 | 5.0 | 18,230,310 | 5.3 | 55,992,830 | 5.1 |
| Fragrances & Cosmetics/D5 | 16,987,801 | 2.2 | 5,161,455 | 1.5 | 22,149,256 | 2.0 |
| Furniture/B9 | 3,438,361 | 0.5 | 15,824,155 | 4.6 | 19,262,517 | 1.7 |
| Garden Supplies & Outdoor Living/C9 | 23,840,678 | 3.1 | 4,244,192 | 1.2 | 28,084,871 | 2.5 |
| Girls' Wear/G1 | 8,019,500 | 1.1 | 2,337,635 | 0.7 | 10,357,136 | 0.9 |
| Hardware & Pet Supplies/C4 | 16,673,059 | 2.2 | 4,192,776 | 1.2 | 20,865,835 | 1.9 |
| Home Furnishings & Giftware/B8 | 15,375,589 | 2.0 | 14,441,110 | 4.2 | 29,816,699 | 2.7 |
| Household Supplies/D3 | 13,209,909 | 1.7 | 5,872,749 | 1.7 | 19,082,659 | 1.7 |
| Housewares/B2 | 11,824,598 | 1.6 | 4,846,996 | 1.4 | 16,671,595 | 1.5 |
| Infants' & Children's Wear/E5 | 10,641,730 | 1.4 | 3,998,561 | 1.2 | 14,640,291 | 1.3 |
| Intimate Apparel & Accessories/E3 | 17,250,662 | 2.3 | 4,153,740 | 1.2 | 21,404,402 | 1.9 |
| Jewelry/[illegible] | 19,140,718 | 2.5 | 11,302,030 | 3.3 | 30,442,749 | 2.8 |
| Luggage & Leather Goods/C1 | 9,117,534 | 1.2 | 2,214,923 | 0.6 | 11,332,458 | 1.0 |
| Men's Wear & Accessories/E2 | 59,649,819 | 7.9 | 15,234,266 | 4.4 | 74,884,086 | 6.8 |
| Party Goods & Greeting Cards/C3 | 11,280,204 | 1.5 | 3,901,940 | 1.1 | 15,182,145 | 1.4 |
| Records & Tapes/A8 | 15,425,283 | 2.0 | 14,579,270 | 4.2 | 30,004,554 | 2.7 |
| Sporting Goods/B3 | 11,949,511 | 1.6 | 7,269,637 | 2.1 | 19,219,149 | 1.7 |
| Stationery/C2 | 12,410,045 | 1.6 | 3,713,311 | 1.1 | 16,123,357 | 1.5 |
| Tobacco & Smoking Accessories/A2 | 94,033,407 | 12.4 | 13,228,146 | 3.9 | 107,261,553 | 9.7 |
| Toiletries & Drugs/D1 | 36,030,728 | 4.8 | 11,056,332 | 3.2 | 47,087,060 | 4.3 |
| Toys & Wheel Goods/C5 | 17,285,934 | 2.3 | 8,402,710 | 2.4 | 25,688,645 | 2.3 |
| Watches & Accessories/D4 | 9,110,016 | 1.2 | 3,972,682 | 1.2 | 13,082,699 | 1.2 |
| Women's Ready-to-Wear/E8 | 25,224,896 | 3.3 | 6,949,180 | 2.0 | 32,174,077 | 2.9 |
| Miscellaneous/E9 | 2,910,375 | 0.4 | 3,047,297 | 0.9 | 5,957,673 | 0.5 |
| Department Sales Adjustments* | | | | | | |
| All "B" Departments/B6 | 20 | a | 1,901,457 | 0.6 | 1,901,457 | 0.2 |
| All "C" Departments/C6 | 909,080 | 0.1 | 119,035 | a | 1,028,116 | 0.1 |
| All "D" Departments/D6 | 0 | a | 55,403 | a | 55,403 | a |
| All "E" Departments/E6 | 0 | a | 65,519 | a | 65,518 | a |
| **Retail Subtotals** | **$714,757,836** | **94.2%** | **$337,063,345** | **98.1%** | **$1,051,821,186** | **95.5%** |
| Uniforms & Accessories | 43,632,353 | 5.8 | 6,396,463 | 1.9 | 50,028,816 | 4.5 |
| **Retail Department Totals** | **$758,390,189** | **100.0%** | **$343,459,808** | **100.0%** | **$1,101,850,002** | **100.0%** |

*Note:* Navy Exchange sales for FY85 are preliminary and unaudited.

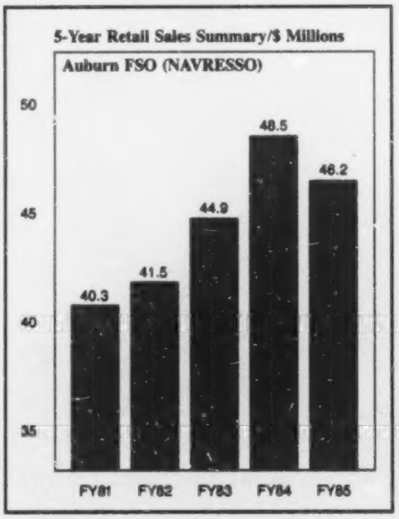
a Less than one-tenth of one percent

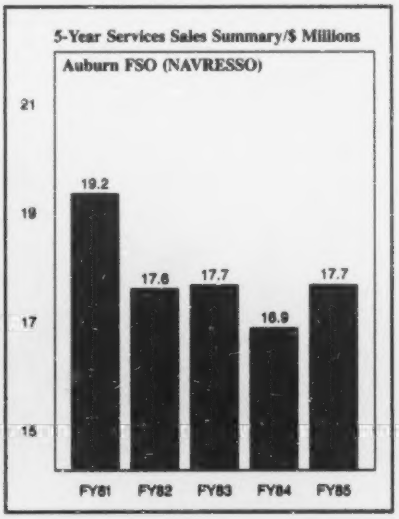
* Sales adjustments compensate for inventory and are prorated among appropriate retail departments prior to NAVRESSO's release of final sales data.

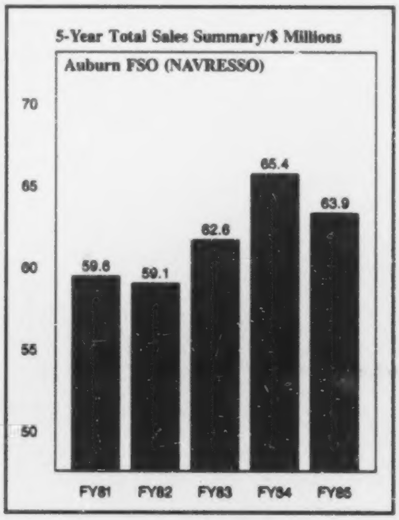
# NAVRESSO Exchange Sales—FY85 Continental U.S.

## Auburn FSO

| Store | FY 85 $ Sales Retail | FY 85 $ Sales Services & Other | FY 85 $ Sales Total | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| Bangor (NSB), WA | 8,813,408 | 5,299,295 | 14,112,703 | 13,452,235 | 5 |
| Bremerton (PSNS), WA | 9,024,173 | 3,487,353 | 12,511,526 | 13,290,141 | −6 |
| Coos Head (NF), OR | 71,567 | 2,472 | 74,039 | 80,539 | −8 |
| Pacific Beach (NF), WA | 101,986 | 17,602 | 119,588 | 119,195 | 0 |
| Seattle (NS), WA | 14,106,174 | 2,756,531 | 16,862,705 | 17,756,589 | −5 |
| Whidbey Island (NAS), WA | 14,114,984 | 6,096,020 | 20,211,004 | 20,722,551 | −2 |
| **Auburn FSO Totals** | **$46,232,292** | **$17,659,273** | **$63,891,565** | **$65,421,250** | **−2%** |


5-Year Retail Sales Summary/$ Millions

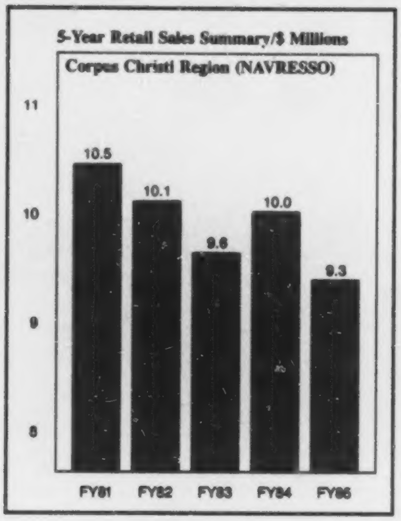

5-Year Services Sales Summary/$ Millions

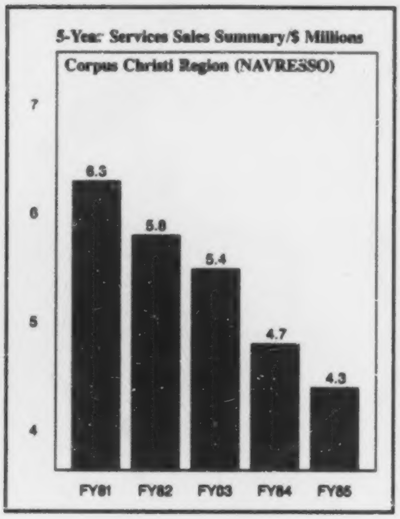

5-Year Total Sales Summary/$ Millions

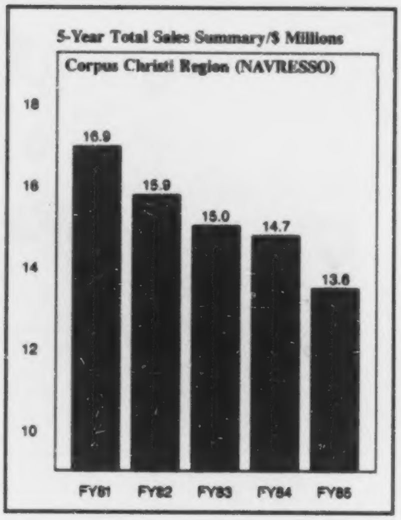
## Corpus Christi Region

| Store | FY 85 $ Sales Retail | FY 85 $ Sales Services & Other | FY 85 $ Sales Total | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| Beeville (NAS), TX[b] | 1,511,104 | 1,170,514 | 2,681,618 | 2,767,382 | −3 |
| Corpus Christi (NAS), TX[m] | 6,267,398 | 2,015,433 | 8,282,831 | 8,993,924 | −8 |
| Kingsville (NAS), TX[b] | 1,488,711 | 1,126,768 | 2,615,479 | 2,969,878 | −12 |
| **Region Totals** | **$9,267,213** | **$4,312,715** | **$13,579,928** | **$14,731,184** | **−8%** |

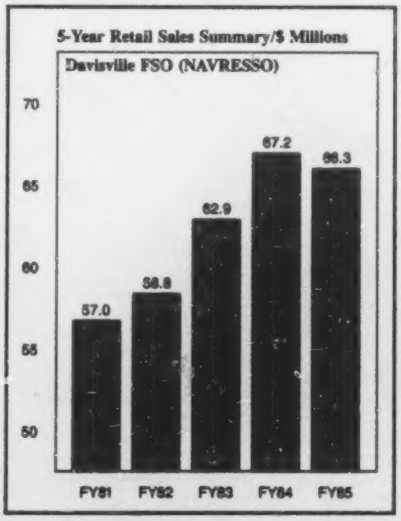
*Notes:* [m]Main Exchange; [b]Branch Exchange

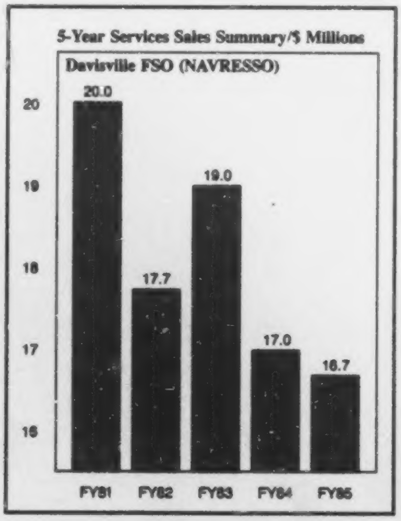


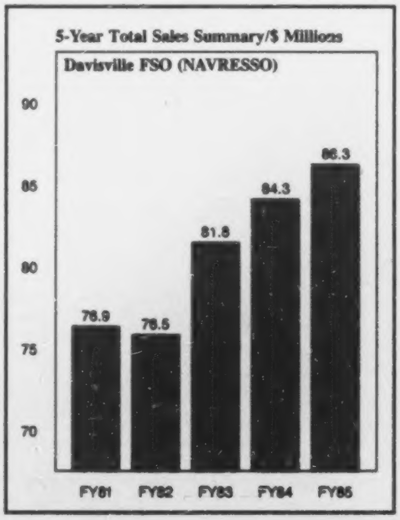




| Store | FY 85 $ Sales<br>Retail | Services & Other | Total | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| Brooklyn (NS), NY | 1,391,472 | 138,195 | 1,529,667 | 1,695,988 | −10 |
| Brunswick (NAS), ME | 7,154,090 | 2,077,341 | 9,231,431 | 9,485,682 | −3 |
| Cutler (NCU), ME | 301,197 | 66,681 | 367,878 | 392,179 | −6 |
| Davisville (NCBC) | 1,698,305 | 22,121 | 1,720,426 | 1,851,677 | −7 |
| Mitchel Field (NHA), NY | 8,158,893 | 1,036,706 | 9,195,599 | 9,454,212 | −3 |
| New London (NSB), CT | 25,213,524 | 8,334,645 | 33,548,169 | 35,988,714 | −7 |
| Newport (NETC), RI | 15,590,273 | 4,001,963 | 19,592,236 | 18,694,680 | 5 |
| Portsmouth (PNS), NH | 426,413 | 295,542 | 721,955 | 740,347 | −2 |
| Scotia (NAU), NY | 1,692,562 | 45,170 | 1,737,732 | 1,922,048 | −10 |
| South Weymouth (NAS), MA | 4,262,118 | 468,350 | 4,730,468 | 5,283,679 | −10 |
| Winter Harbor (NSFGA), ME | 384,581 | 248,912 | 633,493 | 640,282 | −1 |
| **Davisville FSO Totals** | **$66,273,428** | **$16,735,626** | **$83,009,054** | **$86,149,488** | **−4%** |





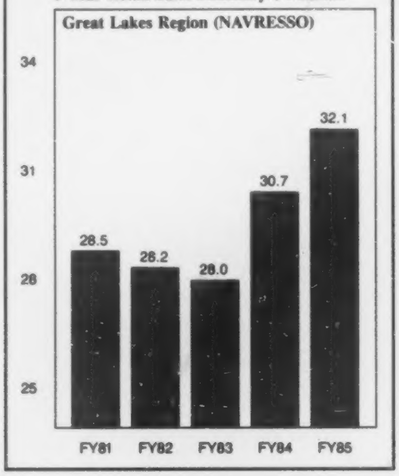


# NAVRESSO Exchange Sales—FY85

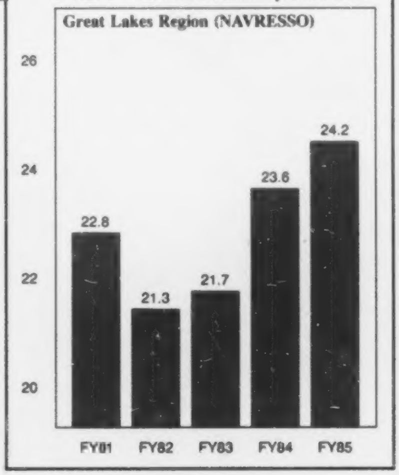
## Great Lakes Region

| Store | FY 85 $ Sales<br>Retail | <br>Services & Other | <br>Total | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| Crane (NWSC), IN | 297,972 | 91,449 | 389,421 | 335,880 | 16 |
| Glenview (NAS), IL | 1,482,475 | 790,534 | 2,273,009 | 2,262,164 | 0 |
| Great Lakes (NRMC), IL | 872,110 | 1,240,277 | 2,112,387 | 2,216,818 | −5 |
| Great Lakes (NAC), IL | 29,477,446 | 22,151,455 | 51,628,901 | 49,526,021 | 4 |
| **Region Totals** | **$32,130,003** | **$24,273,715** | **$56,403,718** | **$54,340,883** | **4%** |

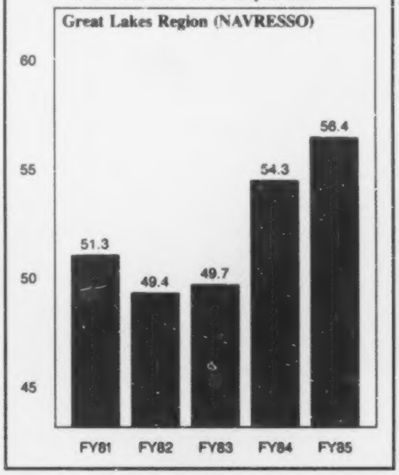
5-Year Retail Sales Summary/$ Millions



5-Year Services Sales Summary/$ Millions

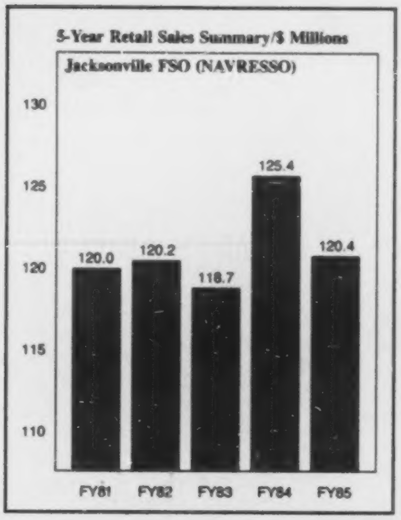


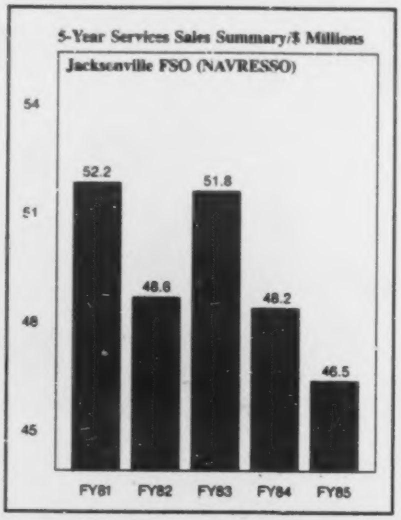
5-Year Total Sales Summary/$ Millions

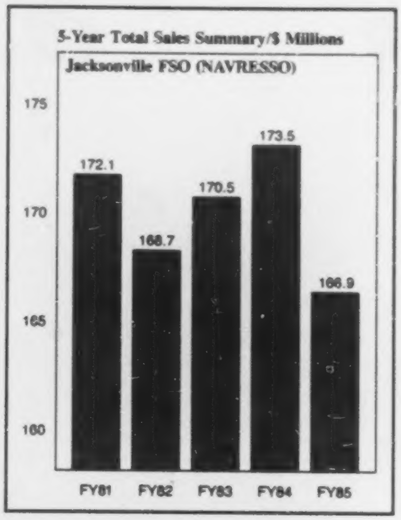


## Jacksonville FSO

| Store | FY 85 $ Sales<br>Retail | <br>Services & Other | <br>Total | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| Athens (NSCS), GA | 1,714,976 | 489,045 | 2,204,021 | 1,993,010 | 11 |
| Atlanta (NAS), GA | 1,887,745 | 764,351 | 2,652,096 | 2,723,191 | −3 |
| Beaufort (NH), SC | 595,211 | 419,024 | 1,014,235 | 1,037,281 | −2 |
| Cecil Field (NAS), FL | 5,924,920 | 4,294,309 | 10,219,229 | 10,046,783 | 2 |
| Charleston (NRMC), SC | 278,033 | 385,540 | 663,573 | 768,116 | −14 |
| Charleston (NS), SC | 13,564,759 | 5,916,136 | 19,480,895 | 22,138,881 | −12 |
| Charleston (NWS), SC | 5,217,919 | 1,741,706 | 6,959,625 | 7,544,977 | −8 |
| Jacksonville (NAS), FL | 26,866,788 | 9,865,232 | 36,732,020 | 39,890,026 | −8 |
| Key West (NAS), FL | 4,346,212 | 1,836,276 | 6,182,488 | 6,299,918 | −2 |
| Kings Bay (NSB), GA | 2,236,814 | 1,679,361 | 3,916,175 | 3,652,714 | 7 |
| Mayport (NS), FL | 9,944,158 | 5,316,380 | 15,260,538 | 14,395,371 | 6 |
| Orlando (NTC), FL | 47,816,271 | 13,752,852 | 61,569,123 | 63,059,653 | −2 |
| **Jacksonville FSO Totals** | **$120,393,806** | **$46,460,212** | **$166,854,018** | **$173,549,921** | **−4%** |

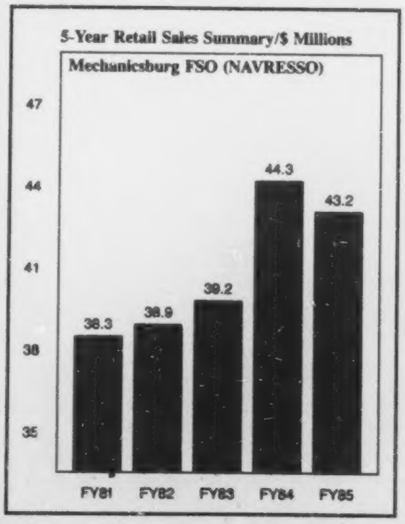

5-Year Retail Sales Summary/$ Millions

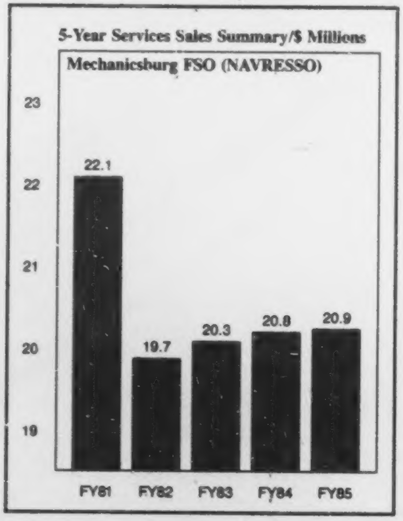

5-Year Services Sales Summary/$ Millions

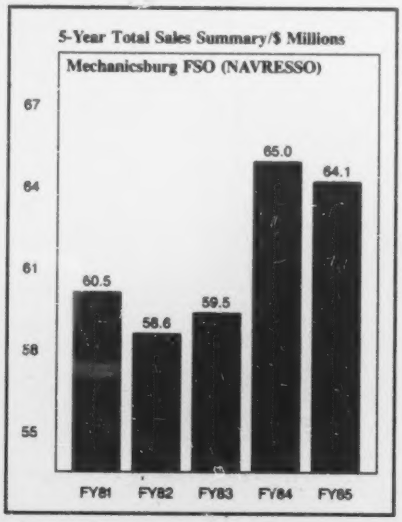

5-Year Total Sales Summary/$ Millions

## Mechanicsburg FSO

| Store | FY 85 $ Sales<br>Retail | <br>Services & Other | <br>Total | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| Annapolis (NS), MD | 4,532,421 | 1,519,241 | 6,051,662 | 5,634,490 | 7 |
| Arlington (NUC), VA | 1,202,808 | 227,933 | 1,430,741 | 1,159,217 | 23 |
| Bethesda (NMC), MD | 8,069,235 | 4,512,095 | 12,581,330 | 12,920,602 | −3 |
| Colts Neck (NWS), NJ | 470,318 | 289,916 | 760,234 | 978,540 | −22 |
| Dahlgren (NSWS), VA | 437,068 | 778,238 | 1,215,306 | 1,148,291 | 6 |
| Indian Head (NOS), MD | 365,510 | 246,204 | 611,714 | 580,699 | 5 |
| Lakehurst (NAEC), NJ | 2,922,421 | 1,006,444 | 3,928,865 | 3,552,722 | 11 |
| Mechanicsburg (NSPCC), PA | 699,366 | 30,318 | 729,684 | 712,467 | 2 |
| Patuxent River (NAS), MD | 6,493,243 | 3,615,433 | 10,108,676 | 10,623,159 | −5 |
| Philadelphia (ASO), PA | 436,764 | 15,765 | 452,529 | 397,056 | 14 |
| Philadelphia (NRMC), PA | 444,774 | 131.189 | 575,963 | 549,036 | 5 |
| Philadelphia (NS), PA | 11,206,394 | 4,432,734 | 15,639,128 | 16,302,282 | −4 |
| Warminster (NADC), PA | 431,857 | 94,730 | 526,587 | 560,182 | −6 |
| Washington Navy Yard (ND), DC | 1,118,634 | 2,914,973 | 4,033,607 | 4,327,460 | −7 |
| Willow Grove (NAS), PA | 4,401,900 | 1,073,237 | 5,475,137 | 5,643,471 | −3 |
| **Mechanicsburg FSO Totals** | **$43,232,713** | **$20,888,450** | **$64,121,163** | **$65,089,674** | **−1%** |

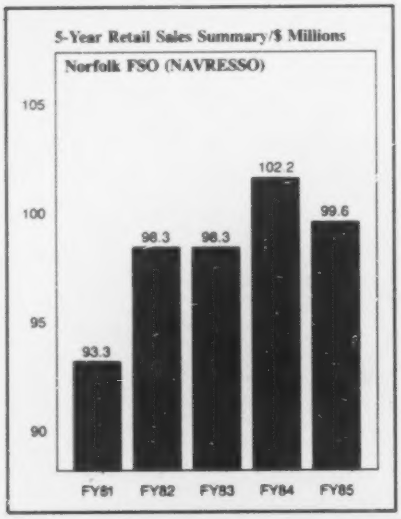

5-Year Retail Sales Summary/$ Millions

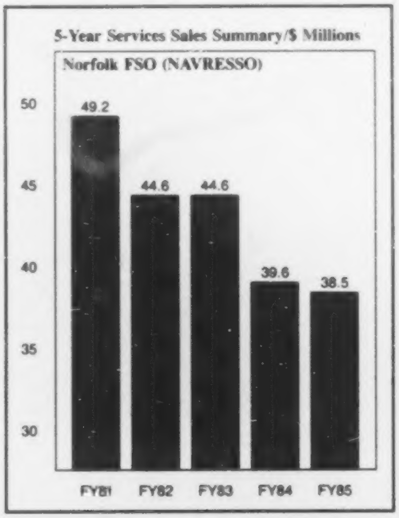

5-Year Services Sales Summary/$ Millions

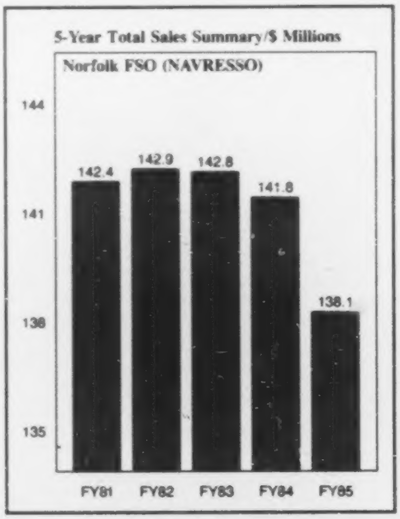

5-Year Total Sales Summary/$ Millions

## Norfolk FSO

| Store | FY 85 $ Sales<br>Retail | Services & Other | Total | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| Chesapeake (NSGA), VA | 405,819 | 235,989 | 641,808 | 634,698 | 1 |
| Little Creek (NAB), VA | 33,408,778 | 7,264,160 | 40,672,938 | 42,214,110 | −4 |
| Norfolk (AFHSA), VA | 1,070,190 | 1,234,885 | 2,305,075 | 2,351,172 | −2 |
| Norfolk (NB), VA | 35,564,740 | 15,868,174 | 51,432,914 | 53,316,698 | −4 |
| Norfolk (NUMOC), VA | 2,436,232 | 0 | 2,436,232 | 1,720,772 | 42 |
| Oceana (NAS), VA | 14,181,130 | 6,209,962 | 20,391,092 | 20,827,080 | −2 |
| Portsmouth (NNS), VA | 6,881,455 | 2,004,703 | 8,886,158 | 9,912,662 | −10 |
| Portsmouth (NRMC), VA | 1,561,865 | 1,887,654 | 3,449,519 | 3,412,671 | 1 |
| Sugar Grove (NRS), WV | 143,643 | 52,949 | 196,592 | 198,672 | −1 |
| Virginia Beach (FAAWTC), VA | 2,458,602 | 2,710,043 | 5,168,645 | 4,731,358 | 9 |
| Yorktown (NWS), VA | 1,471,315 | 1,081,404 | 2,552,719 | 2,475,577 | 3 |
| **Norfolk FSO Totals** | **$99,583,769** | **$38,549,923** | **$138,133,692** | **$141,795,470** | **−3%** |

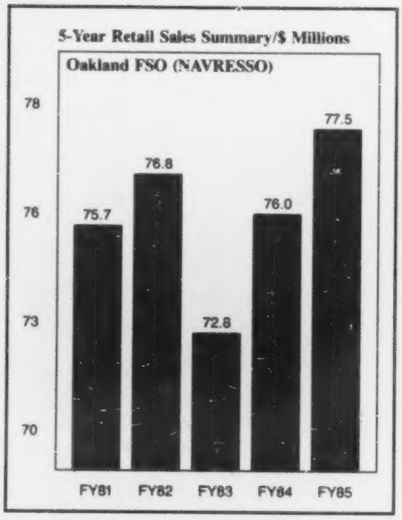

5-Year Retail Sales Summary/$ Millions


5-Year Services Sales Summary/$ Millions

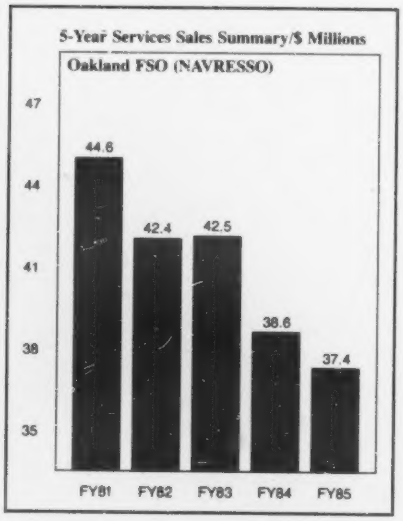

5-Year Total Sales Summary/$ Millions

## Oakland FSO

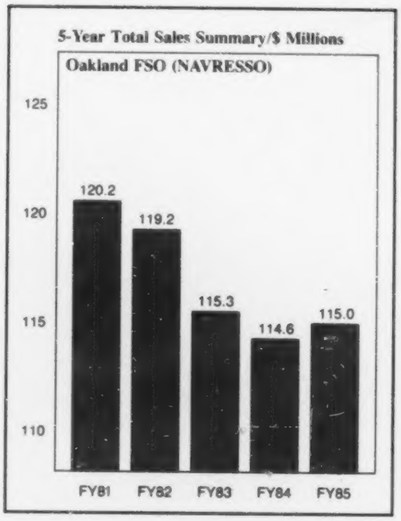
| Store | FY 85 $ Sales<br>Retail | Services & Other | Total | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| Alameda (NAS), CA | 17,389,347 | 6,822,518 | 24,211,865 | 23,611,775 | 3 |
| Concord (NWS), CA | 795,943 | 530,535 | 1,326,478 | 1,335,416 | −1 |
| Fallon (NAS), NV | 1,855,144 | 1,474,846 | 3,329,990 | 2,777,034 | 20 |
| Ferndale (NF), CA | 131,767 | 86,235 | 218,002 | 253,395 | −14 |
| Lemoore (NAS),CA | 8,306,236 | 5,657,769 | 13,964,005 | 15,131,344 | −8 |
| Mare Island (NS), CA | 7,416,814 | 5,327,206 | 12,744,020 | 12,648,986 | 1 |
| Moffett Field (NAS), CA | 19,745,937 | 7,321,526 | 27,067,463 | 27,833,885 | −3 |
| Monterey (NPGS), CA | 8,323,323 | 3,403,769 | 11,727,092 | 10,228,224 | 15 |
| Novato (DoDHF), CA | 5,414,457 | 1,874,544 | 7,289,001 | 7,514,839 | −3 |
| Oakland (NRMC), CA | 2,205,841 | 1,496,260 | 3,702,101 | 3,965,252 | −7 |
| Oakland (NSC), CA | 412,161 | 485,712 | 897,873 | 845,032 | 6 |
| Skaggs Island (NSGA), CA | 120,826 | 155,527 | 276,353 | 275,478 | 0 |
| Stockton (NCS), CA | 1,366,793 | 483,330 | 1,850,123 | 1,793,413 | 3 |
| Treasure Island (NSA), CA | 4,041,631 | 2,313,521 | 6,355,152 | 6,410,870 | −1 |
| **Oakland FSO Totals** | **$77,526,220** | **$37,433,298** | **$114,959,518** | **$114,624,943** | **0%** |


5-Year Retail Sales Summary/$ Millions

Oakland FSO (NAVRESSO)


5-Year Services Sales Summary/$ Millions

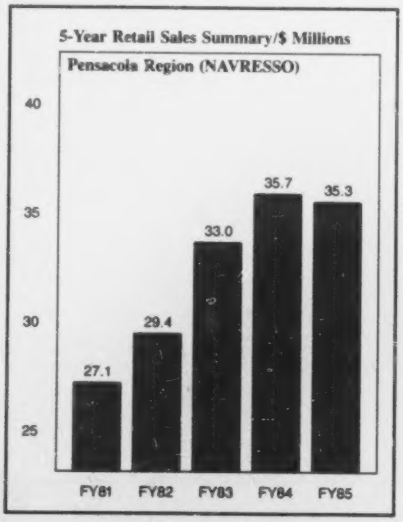
Oakland FSO (NAVRESSO)


5-Year Total Sales Summary/$ Millions

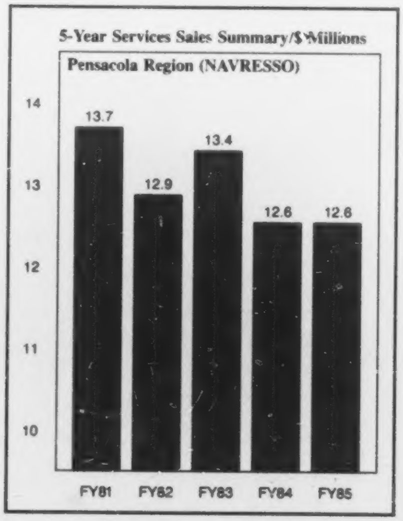
Oakland FSO (NAVRESSO)

## Pensacola Region

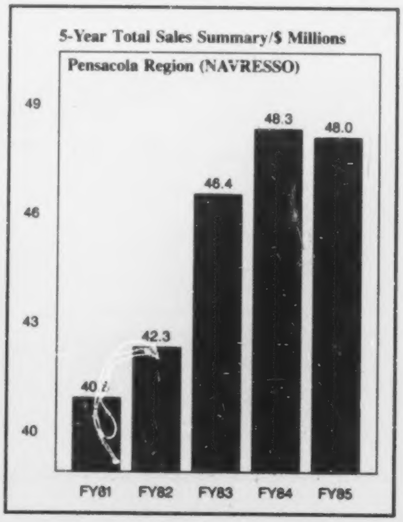
| Store | FY 85 $ Sales Retail | Services & Other | Total | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| Gulfport (NCBC), MS | 4,550,208 | 2,526,928 | 7,077,136 | 6,687,025 | 6 |
| Panama City (NCSC), FL | 1,192,281 | 408,777 | 1,601,058 | 1,635,637 | −2 |
| Pascagoula (SSCR), MS | 543,861 | 72,168 | 616,029 | 528,982 | 16 |
| Pensacola (NAS), FL | 25,253,594 | 6,601,761 | 31,855,355 | 32,207,058 | −1 |
| Pensacola (NTTC), FL | 1,470,075 | 1,475,678 | 2,945,753 | 3,286,142 | −10 |
| Whiting Field (NAS), FL | 2,318,494 | 1,528,394 | 3,846,888 | 3,987,297 | −4 |
| **Region Totals** | **$35,328,513** | **$12,613,706** | **$47,942,219** | **$48,332,141** | **−1%** |


5-Year Retail Sales Summary/$ Millions

Pensacola Region (NAVRESSO)


5-Year Services Sales Summary/$ Millions

Pensacola Region (NAVRESSO)

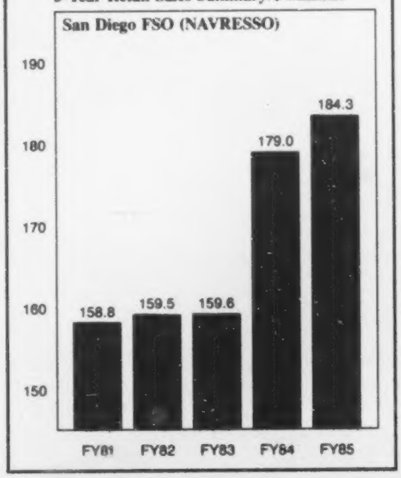

5-Year Total Sales Summary/$ Millions

Pensacola Region (NAVRESSO)

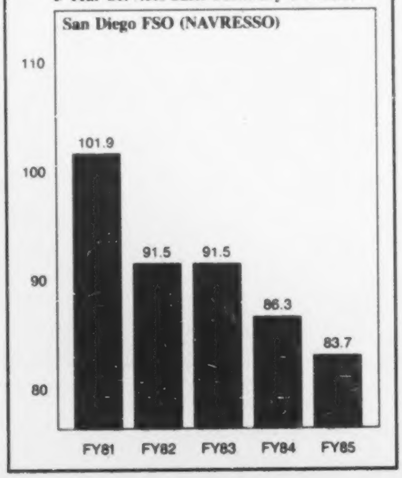
## San Diego FSO

| Store | FY 85 $ Sales Retail | FY 85 $ Sales Services & Other | FY 85 $ Sales Total | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| China Lake (NWC), CA | 2,647,724 | 2,049,076 | 4,696,800 | 4,486,867 | 5 |
| Coronado (NAB), CA | 3,780,765 | 3,222,012 | 7,002,777 | 6,821,228 | 3 |
| El Centro (NAF), CA | 691,585 | 482,096 | 1,173,681 | 1,212,397 | −3 |
| Imperial Beach (NLF), CA | 5,990,652 | 1,932,931 | 7,923,583 | 8,165,789 | −3 |
| Long Beach (NS), CA | 21,784,702 | 7,528,243 | 29,312,945 | 31,506,072 | −7 |
| Miramar (NAS), CA | 38,038,709 | 13,086,419 | 51,125,128 | 47,811,292 | 7 |
| North Island (NAS), CA | 16,516,785 | 10,747,978 | 27,264,763 | 27,257,230 | 0 |
| Point Mugu (NAS), CA | 4,243,164 | 2,943,162 | 7,186,326 | 6,956,795 | 3 |
| Port Hueneme (NCBC), CA | 14,160,795 | 5,423,390 | 19,584,185 | 20,187,975 | −3 |
| San Clemente Island (NALF), CA | 216,504 | 49,798 | 266,302 | 195,179 | 36 |
| San Diego (NH), CA | 3,305,766 | 2,239,402 | 5,545,168 | 6,116,241 | −9 |
| San Diego (NS), CA | 53,694,255 | 16,298,518 | 69,992,773 | 67,617,339 | 4 |
| San Diego (NSSF), CA | 1,554,021 | 1,783,486 | 3,337,507 | 2,986,474 | 12 |
| San Diego (NAC), CA | 17,637,711 | 15,919,649 | 33,557,360 | 33,997,177 | −1 |
| **San Diego FSO Totals** | **$184,263,138** | **$83,706,160** | **$267,969,298** | **$265,318,055** | **1%** |

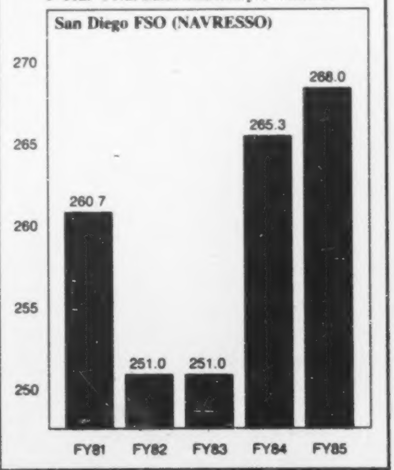
5-Year Retail Sales Summary/$ Millions



5-Year Services Sales Summary/$ Millions



5-Year Total Sales Summary/$ Millions



## Stand Alone Exchanges

| Store | FY 85 $ Sales Retail | FY 85 $ Sales Services & Other | FY 85 $ Sales Total | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| Dallas (NAS), TX | 7,728,375 | 1,633,706 | 9,362,081 | 10,314,697 | −9 |
| Meridian (NAS), MS | 4,941,596 | 2,331,740 | 7,273,336 | 7,689,019 | −5 |
| Millington (Memphis NAS), TN | 21,722,363 | 10,526,912 | 32,249,275 | 32,775,616 | −2 |
| New Orleans (NSA), LA | 8,901,212 | 3,215,622 | 12,116,834 | 11,129,316 | 9 |
| Staten Island (NUS), NY | 216,829 | 0 | 216,829 | 177,938 | 22 |

## Totals

|  | FY 85 $ Sales Retail | FY 85 $ Sales Services & Other | FY 85 $ Sales Total | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| **CONUS Totals** | **$757,741,470** | **$320,341,058** | **$1,078,082,528** | **$1,091,439,595** | **−1%** |

# NAVRESSO Exchange Sales—FY85 Overseas

## Alaska

| Store | FY 85 $ Sales<br>Retail | <br>Services & Other | <br>Total | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| Adak (NS)[m] | 8,486,613 | 2,792,998 | 11,279,611 | 11,055,151 | 2 |

*Notes:* [m]Main Exchange; [b]Branch Exchange

## Australia

| Store | FY 85 $ Sales<br>Retail | <br>Services & Other | <br>Total | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| Exmouth (NCS)[m] | 1,553,484 | 318,427 | 1,871,911 | 1,597,603 | 17 |

*Notes:* [m]Main Exchange; [b]Branch Exchange

## Bermuda

| Store | FY 85 $ Sales<br>Retail | <br>Services & Other | <br>Total | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| Bermuda (NAS)[m] | 8,556,162 | 1,606,486 | 10,162,648 | 8,476,466 | 20 |

*Notes:* [m]Main Exchange; [b]Branch Exchange

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## NAVRESSO Exchange Sales—FY85

### Crete

| Store | FY 85 $ Sales<br>Retail | <br>Services & Other | <br>Total | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| Souda Bay (NAS), Crete[b] | 447,767 | 79,349 | 527,116 | 566,118 | −7 |

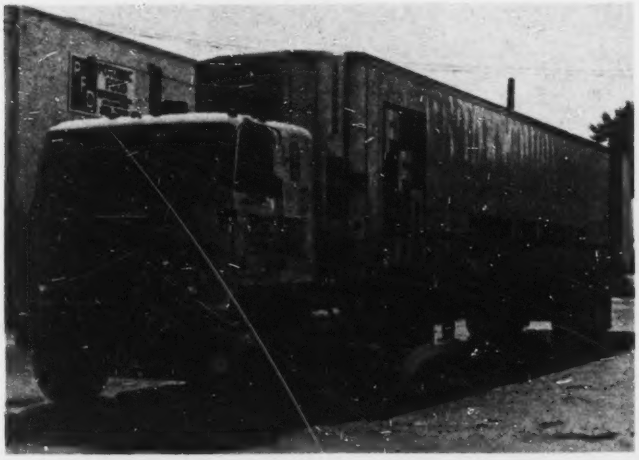
### Cuba

| Store | FY 85 $ Sales<br>Retail | <br>Services & Other | <br>Total | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| Guantanamo Bay (NS)[m] | 15,634,409 | 4,884,135 | 20,518,544 | 16,314,170 | 26 |

### Hawaii

| Store | FY 85 $ Sales<br>Retail | <br>Services & Other | <br>Total | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| Barbers Point (NAS)[m] | 15,707,407 | 6,556,513 | 22,263,920 | 22,703,030 | −2 |
| Honolulu (NCA)[b] | 809,272 | 575,105 | 1,384,377 | 1,431,019 | −3 |
| Kekaha (PMRF)[b] | 1,691,327 | 267,756 | 1,959,083 | 1,841,509 | 6 |
| Lualualei (NM)[b] | 510,985 | 283,598 | 794,583 | 835,762 | −5 |
| Pearl Harbor (NB)[m] | 69,411,581 | 17,527,331 | 86,938,912 | 88,004,677 | −1 |
| **Hawaii Totals** | **$88,130,572** | **$25,210,303** | **$113,340,875** | **$114,815,997** | **−1%** |

*Notes:* [m]Main Exchange; [b]Branch Exchange



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# NAVRESSO Exchange Sales—FY85

## Iceland

| Store | FY 85 $ Sales | | | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| Keflavik (NS)[m] | 15,281,094 | 3,902,975 | 19,184,069 | 14,913,934 | 29 |

## Italy

| Store | FY 85 $ Sales | | | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| Gaeta (NSAD)[b] | 721,832 | 481,211 | 1,203,043 | 1,540,804 | −22 |
| Naples (NAS)[m] | 21,679,462 | 8,840,964 | 30,520,426 | 31,106,657 | −2 |
| Sardina (NSO)/La Maddalena[b] | 1,691,410 | 314,445 | 2,005,855 | 1,902,215 | 5 |
| Sigonella (NAF)/Sicily[b] | 11,774,624 | 4,279,769 | 16,054,393 | 15,853,933 | 1 |
| **Italy Totals** | **$35,867,328** | **$13,916,389** | **$49,783,717** | **$50,403,609** | **−1%** |

## Japan

| Store | FY 85 $ Sales | | | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| Atsugi (NAF)[m] | 8,199,146 | 2,980,920 | 11,180,066 | 12,259,927 | −9 |
| Sanno Hotel (NEF)[b] | 2,223,533 | 204,220 | 2,427,753 | 2,342,802 | 4 |
| Sasebo (NOF)[b] | 3,283,828 | 761,726 | 4,045,554 | 4,111,886 | −2 |
| Yokosuka (FA)[m] | 36,499,487 | 11,025,059 | 47,524,546 | 49,582,284 | −4 |
| **Japan Totals** | **$50,205,994** | **$14,971,925** | **$65,177,919** | **$68,296,899** | **−5%** |

## Marianas Islands

| Store | FY 85 $ Sales | | | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| Guam (NS)[m] | 49,810,838 | 10,653,934 | 60,464,772 | 47,223,960 | 28 |

## Newfoundland

| Store | FY 85 $ Sales | | | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| Argentia (NF)[m] | 1,236,680 | 289,375 | 1,526,055 | 1,271,503 | 20 |

## New Zealand

| Store | FY 85 $ Sales | | | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| Christchurch (NSFAD)[m] | 537,001 | 17,313 | 554,314 | 564,314 | −2 |

## Philippines

| Store | FY 85 $ Sales | | | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| Cubi Point (NAS)[b] | 6,094,484 | 2,858,090 | 8,952,574 | 8,954,126 | 0 |
| San Miguel (NCS)[b] | 1,991,524 | 760,466 | 2,751,990 | 2,634,343 | 4 |
| Subic Bay (NS)[m] | 35,029,350 | 10,450,628 | 45,479,978 | 45,048,279 | 1 |
| **Philippines Totals** | **$43,115,358** | **$14,069,184** | **$57,184,542** | **$56,636,748** | **1%** |

*Notes:* [m]Main Exchange; [b]Branch Exchange

# NAVRESSO Exchange Sales—FY85

## Portugal

| Store | FY 85 $ Sales | | | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| Lisbon (NSUH)[b] | 653,071 | 0 | 653,071 | 659,103 | −1 |

*Notes:* [m]Main Exchange; [b]Branch Exchange

## Puerto Rico

| Store | FY 85 $ Sales | | | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| Roosevelt Roads (NS)[m] | 15,841,584 | 4,351,926 | 20,193,510 | 21,515,772 | −6 |
| Sabana Seca (NSGA)[b] | 2,522,467 | 223,502 | 2,745,969 | 3,381,448 | −19 |
| **Puerto Rico Totals** | **$18,364,051** | **$4,575,428** | **$22,939,479** | **$24,897,220** | **−8%** |

*Notes:* [m]Main Exchange; [b]Branch Exchange

## Spain

| Store | FY 85 $ Sales | | | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| Rota (NS)[m] | 17,975,221 | 6,609,739 | 24,584,960 | 25,606,650 | −4 |

*Notes:* [m]Main Exchange; [b]Branch Exchange

## United Kingdom

| Store | FY 85 $ Sales | | | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| Brawdy (NF), Wales | 652,673 | 273,057 | 925,730 | 900,056 | 3 |
| Edzell (NMSGA), Scotland | 1,889,672 | 531,506 | 2,421,178 | 2,564,852 | −6 |
| Holy Loch (NA), Scotland | 2,941,400 | 350,505 | 3,291,905 | 3,480,074 | −5 |
| London (NAUK), England | 1,143,256 | 155,813 | 1,299,069 | 1,457,179 | −11 |
| Machrihanish (NAWF), Scotland | 197,633 | 29,705 | 227,338 | 237,715 | −4 |
| St. Mawgan (NAWF), Scotland | 250,914 | 122,228 | 373,142 | 422,672 | −12 |
| Thurso (NCS), Scotland | 436,826 | 65,864 | 502,690 | 551,118 | −9 |
| West Ruislip, London (NA), England | 1,764,458 | 344,104 | 2,108,562 | 2,466,358 | −15 |
| **United Kingdom Totals** | **$9,276,832** | **$1,872,782** | **$11,149,614** | **$12,080,024** | **−8%** |

## West Indies

| Store | FY 85 $ Sales | | | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| Antigua (NF)[b] | 648,718 | 111,323 | 760,041 | 790,577 | −4 |

*Notes:* [m]Main Exchange; [b]Branch Exchange

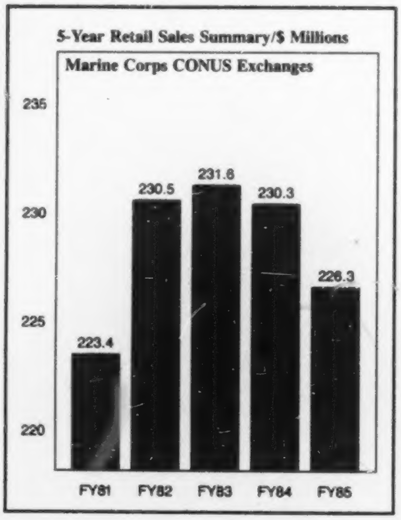
## Totals

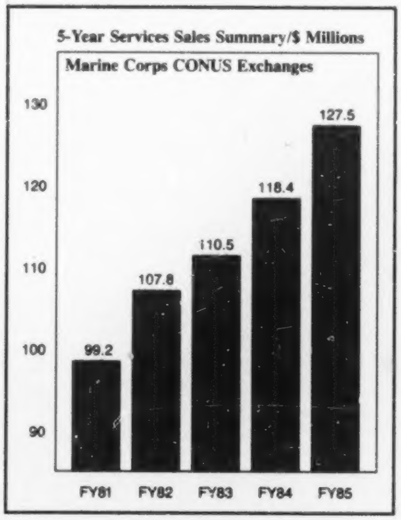
| | FY 85 $ Sales | | | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| **Overseas Totals** | **$365,781,193** | **$105,882,065** | **$471,663,258** | **$456,170,046** | **3%** |
| **Worldwide Totals** | **$1,123,522,663** | **$426,223,123** | **$1,549,745,786** | **$1,547,609,641** | **0%** |

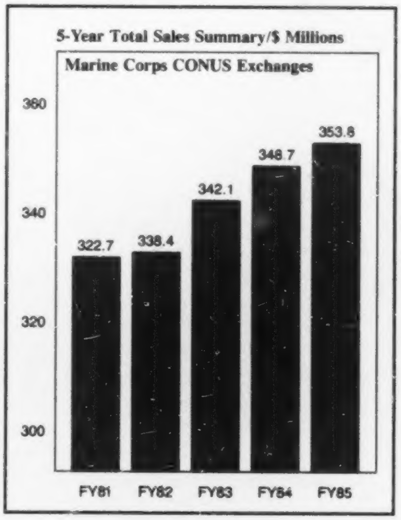
# Marine Corps Exchange Sales—FY85

## Continental U.S.

| Store | FY 85 $ Sales | | | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| Albany, GA | 3,267,226 | 1,108,715 | 4,375,941 | 4,416,846 | −1 |
| Barstow, CA | 1,143,639 | 1,436,124 | 2,579,763 | 2,626,307 | −2 |
| Camp Elmore, VA | 3,872,610 | 1,320,190 | 5,192,800 | 5,344,054 | −3 |
| Camp Lejeune, NC | 36,469,181 | 31,321,009 | 67,790,190 | 65,165,791 | 4 |
| Camp Pendleton, CA | 39,412,711 | 28,718,702 | 68,131,413 | 69,678,846 | −2 |
| Cherry Point, NC | 13,676,708 | 10,959,053 | 24,635,761 | 22,141,541 | 11 |
| El Toro, CA | 28,393,947 | 20,450,989 | 48,844,936 | 44,588,557 | 10 |
| Henderson Hall, VA | 10,494,369 | 1,269,178 | 11,763,547 | 11,785,814 | 0 |
| Parris Island, SC | 17,203,080 | 6,507,200 | 23,710,280 | 25,030,551 | −5 |
| Quantico, VA | 29,731,009 | 4,573,723 | 34,304,732 | 36,298,296 | −5 |
| San Diego, CA | 24,631,759 | 6,418,196 | 31,049,955 | 32,045,742 | −3 |
| Twentynine Palms, CA | 13,753,204 | 8,685,057 | 22,438,261 | 21,126,941 | 6 |
| Yuma, AZ | 4,294,062 | 4,687,370 | 8,981,432 | 8,456,705 | 6 |
| **CONUS Totals** | **$226,343,505** | **$127,455,506** | **$353,799,011** | **$348,705,991** | **1%** |

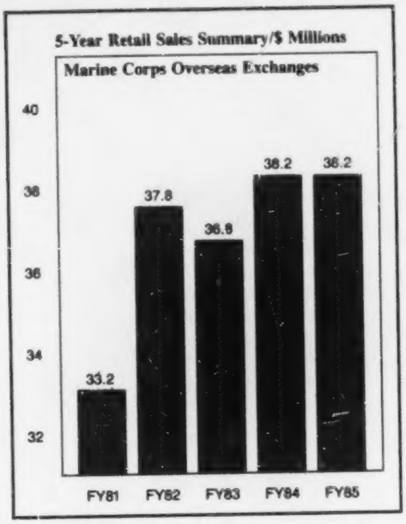


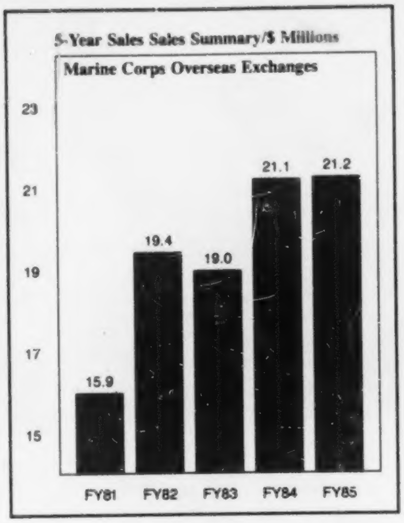


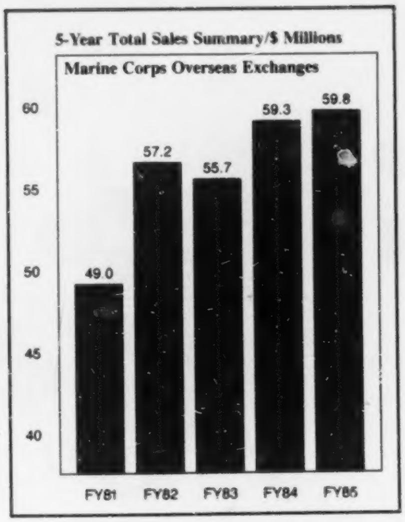


## Overseas

| Store | FY 85 $ Sales | | | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| Guantanamo Bay, Cuba | 5,212,269 | 348,494 | 5,560,763 | 5,094,190 | 9 |
| Iwakuni, Japan | 10,671,262 | 7,019,637 | 17,690,899 | 16,234,971 | 9 |
| Kaneohe Bay, HI | 18,890,408 | 13,870,718 | 32,761,126 | 34,044,820 | −4 |
| Rodman (Canal Zone), Panama | 3,431,859 | 349,905 | 3,781,764 | 3,937,459 | −4 |







**Totals**

| | FY 85 $ Sales | | | Total $ Sales FY 84 | Total Sales % Change 85 vs 84 |
|---|---|---|---|---|---|
| | Retail | Services & Other | Total | | |
| Overseas Totals | $38,205,798 | $21,588,754 | $59,794,552 | $59,311,440 | 1 |
| Worldwide Totals | $264,549,303 | $149,044,260 | $413,593,563 | $408,017,431 | 1% |

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